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# **2018 Proceedings** of the **North American Case Research Association**

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## Table of Contents

<i>PAUL R. LAWRENCE FELLOWSHIP WORKSHOP</i> .....	6
<i>START-UP CASE WORKSHOP</i> .....	7
<i>ACCOUNTING, FINANCE, AND ECONOMICS CASES</i> .....	10
State Bank of India: Reinventing Business.....	11
Jim Zeigler, State Auditor of Alabama: Duty versus Authority.....	12
Rules and Standards in Tax Incentives .....	13
Fight or Flight? Non-Compete Agreements in Physician Labor Markets .....	14
Go On – Stay On: Making a College Education Free to All Idaho Residents.....	15
Why Buy New When Used Will Do?.....	16
Agua Clara S.A. ....	17
BusBoard Prototype Systems: Making Cents of Foreign BusBoard Prototype Systems.....	18
Lockheed Martin and Leidos Holdings: A Reverse Morris What? .....	19
Zorbas Bakeries (Cyprus): Launching A New Concept Store In New York?.....	20
Sunar Factory: Investment Opportunity and a Financing Dilemma.....	21
<i>DIGITAL TECHNOLOGIES AND OPERATIONS CASES</i> .....	22
Ajax Paving Industries, Inc.: A Training and Development Opportunity.....	23
Globaltech Customer Relationship Management Software Integration Project: Challenges of Information Systems Consolidation.....	24
Langdon Art Institute – Star Enterprise Resource Planning Software Implementation Challenges.....	25
Walked Into A Lamppost? - A Coding Compliance Crisis! .....	26
<i>CASES WRITTEN IN FRENCH</i> .....	27
Bewööd : Nœuds Papillon Et Accessoires En Bois. Comment Piloter La Politique Tarifaire D’une Start-Up ? .....	28
Le Chocolat Des Français : Quel Concept-Store. Pour Croquer La Planète Et La Faire Fondre De Plaisir ? .....	29
Pour Vous Dépanner, Allovoisins Actionne 10 Millions de Sonneries!.....	30
Cora Nancy, Le Challenge Des Produits Locaux .....	31
L’aventure Entrepreneuriale Les Bouchons.....	32
Les Biscuits de Mr. Laurent.....	33
L’Arpeg Au Maroc : Comment Commercialiser Un Couscous Local Authentique Sur Le Marché National ? .....	34
Crowdfunding Immobilier À Ploemeur : Investissement À Risque Conséquent Ou Mesuré ? .....	35
<i>CASES WRITTEN IN SPANISH</i> .....	36
Para Cualquier Mal... ¿Vino, Tequila O Mezcal?.....	37

PLENUM: ¿El Detalle Está En El Anaquel? .....	38
Porvenir: Rediseñando la experiencia del cliente vía Design Thinking .....	39
Logrando un Sueño en El Agro.....	40
Ciudad Colonial de Santo Domingo: En La Búsqueda de Valor Sostenible.....	41
El nuevo distribuidor para GCC.....	42
ISA y la decisión estratégica de InterNexa .....	43
Interacpedia: Cambiando El Modelo Educativo Del Mundo .....	44
EMPLAC y el lanzamiento de un nuevo producto en Cuba .....	45
<i>CORPORATE GOVERNANCE AND ETHICS CASES.....</i>	<i>46</i>
Spot fixing in cricket: Amir’s no-ball.....	47
Two Wrongs. Can He Make It Right.....	48
Hershey’s Ethical Supply Chain Dilemma: Should Cocoa Growers Be Offered A Living Income?.....	49
Is It Wrong to Be Right? Confronting Alcoholism on The Job.....	50
No Strategy & No Ceo: Is Loycocracy Sustainable?.....	51
<i>ENTREPRENEURSHIP, FAMILY, AND SMALL BUSINESS CASES.....</i>	<i>52</i>
The Case of The Misfit Manager: Brantham’s English Pub .....	53
Canna Maestro: Leveraging an Underperforming Dispensary.....	54
‘Raj Electronics’ – Transition to Online.....	55
Selectronic: Facing Disruption Due to Artificial Intelligence.....	56
Rooh Afza – Tumbling Forward with Heritage .....	57
Keweenaw Mountain Lodge: An Opportunity with Pursuing?.....	58
Yerdle: Scaling Up in The Sharing Economy.....	59
Invisawear Part I: Evolving the Entrepreneurial Mindset.....	60
Invisawear Part II: Bridges Under Construction .....	61
Invisawear Part III: Building Traction with Crowdfunding.....	62
Expand.It: Organic Vs. Partnership Growth Dilemma .....	63
Gunnels and Son.....	64
Sharing Academy: Introducing Peer-Tutoring in Spanish UniversitiesSharing Academy .....	65
Bake Parlor Goes Italian – Boosting the Pasta Category In Pakistan.....	66
<i>MARKETING AND INTERNATIONAL BUSINESS CASES .....</i>	<i>67</i>
Tequila Ambhar: Designing A Growth Strategy For The U.S. Market.....	68
Bumbox - Who Should My Target Customer Be? .....	69
Trivium Industries: A New Venture in Bio-Degradable Plastics .....	70
Carving a Niche in a Crowded Market: e-Emphasis ERP .....	71
WWF Singapore Promoting Sustainable Seafood.....	72

Should You Need A Service or a Helping Hand, The Social Network Allovosins.Com Will Ring 10 Millions' Bells For You!.....	73
Brita & Stephen Curry .....	74
Capitalcare Foundation – An Identity Crisis.....	75
“We Are Love” –Setting the Price for My First Painting .....	76
A Road to Adventure With Happiness: From Students to Senior Citizens! .....	77
Snakes & Lattes.....	78
<i>ORGANIZATIONAL BEHAVIOR AND HUMAN RESOURCES CASES.....</i>	<i>79</i>
Blackjack or Bust: Gambling on The Future .....	80
Transforming Padmore Primary .....	81
Goal Setting Scandal at TD Bank Group – How Effective Is Goal Setting in Motivating Employees? .....	82
Breaking the Mold: Tasus Overcomes Its Labor Challenges.....	83
Boss Is Not Yet Pleased;.....	84
Did the Performance Matter? .....	84
The Recruitment Process At Jc Premium Cars: There Are No More Candidates? .....	85
Hailey’s Handbags – Customer Complaints or Cyberbullying? .....	86
Quattro Global Services: One Woman Campaign Inculcating a Culture of Gender Equity in an Emerging Market.....	87
The Development and Reflections of a Black STEM Solopreneur .....	88
<i>SOCIAL ENTREPRENEURSHIP AND SUSTAINABILITY CASES .....</i>	<i>89</i>
Maryland Information Sharing and Analysis Organization .....	90
Pseg and the Promise of Wind Power.....	91
The Rocket Stove: Results-Based Financing Through Carbon Credits.....	92
For & From: Inditex Group’s Social Franchise.....	93
Can a Not-For-Profit Radio Station Survive in a Declining Industry with an Inexperienced Manager?.....	94
The Beiteddine Festival: A Budget Gap .....	95
Ozark Natural Foods.....	96
Casa Andina Hotels .....	97
Baldor Specialty Foods: The “Sparcs” Challenge.....	98
Laureate Education Inc: Always Meant To B? .....	99
Paw Works: From Shelters To “Furever’ Homes” .....	100
<i>STRATEGY AND POLICY CASES.....</i>	<i>101</i>
Lions Eye Institute at The Crossroads .....	102
SeniorVu: Designing our B2C Strategy to Support our B2B Clients.....	103
Whither our Parents in their Post-Retirement Years? An Industry Note on the U.S. Senior Care and Living Arrangements Industry Segments.....	104

AMC Networks, Inc.: “ <i>The Walking Dead</i> ” Problem.....	105
Little Short Stop: Competing in a Shifting Industry.....	106
Strategic Grouping of SD Winery: Be Different Or Strategic Alignment? .....	107
Eastern College: Conserving an Institution.....	108
A New Horizon .....	109
Vista Outdoor: A Business Portfolio Under Stress.....	110
The ‘Useless’ Case: Defining Competition in The Gray Zone .....	111
Athena Software: Vision 2020 .....	112
India Post: In search of an identity (A).....	113
IoT Gamification at McDonald’s Japan with Pokémon GO .....	114

## PAUL R. LAWRENCE FELLOWSHIP WORKSHOP

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 2015, this is the fourth year of the program's operation.

In 2018, the Case Research Foundation awarded fellowships to:

<b>Name</b>	<b>Country</b>	<b>Institution</b>
Remy Michael Balarezo Nuñez	Peru	Universidad de Piura
Cle-Anne Gabriel	Australia	University of Queensland Business School
Joshin John	India	Xavier Institute of Management and Entrepreneurship
Aidin Namin	United States	College of Business Administration, Loyola Marymount University
Neetu Yadav	India	Birla Institute of Technology and Science
Pawel Ziemianski	Poland	Faculty of Management and Economics, Gdansk University of Technology
Danielle J. Clark	United States	U of S Florida, Muma College of Business
Oussama Darouichi	Switzerland	Université de Neuchâtel
Sonali Jain	India	Indian Institute of Management
Roberto Santos	United States	U of Massachusetts Lowell, Manning School of Business

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](http://www.caseresearchfoundation.org).

# START-UP CASE WORKSHOP

Thursday, 1:00-4:00 pm

Room: Ballroom C

**Track Chair:** Cynthia Ingols, Simmons College  
**Track Co-Chair:** Mary O'Rourke, Harvard Law School

## 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.

Karen Boroff  
Sergio Canavati  
Gina Grady

Randy Harris  
Joe Kavanaugh

Lynda Swayne  
Rebecca Morris

## Case Author(s)

## Start Up Case Title

Balarezo Nuñez, Remy Michael  
Corcuera Garcia, Paul

International Cooperation, How can we sustain our projects in the Long-Term?

Ballesteros-Sola, Maria  
Goldman, Michael

Juggle the World: Attracting sponsors isn't always fair play

Bishop, Tres

Executive Decisions: All in a day's work

Brown, Leslie  
Rixon, Daphne

Our co-op is in crisis: Should we take time to do strategic planning?

Chaudry, Arit  
Guha, Soumyajit

Calcutta Angels

Clark, Danielle

Aspire Financial: Refocusing on Employee Engagement After Change

Furey, Mary

An Academic Faculty Members Decision: to Grieve or not to Grieve

Gabriel, Cle-Anne  
Stanley, Maree

Tjapukai Aboriginal Cultural Park: A Social Enterprise Success Story

Galperin, Bella  
McInnis-Bowers, Cecilia

Indigenous Female Entrepreneurs in Costa Rica

Glover, Priva  
Dasgupta, Sabyasachi

Public Speaking: A communicative art on the horns of dilemma!

<b>Case Author(s)</b>	<b>Start Up Case Title</b>
Haider, Sajjad Rong, Cheng Young, Michael	Buy or Not to Buy- Consumers Buying Behavior for Perfumes in China
Jain, Sonali Kumar Agarwalla, Sobhesh	From Rags to Riches to Rags: A Case of Vakrangee
Ha John, Joshin Joseph, Joshy	Indus Motors: Driving Analytics into Action
Jones, Keith	A Presence on Campus: Not Allowed
Kizer, Tracy	When Bad Brands Do Good: A Mismatch of Missions in Non-Profit Sponsorships
Lucero, Margaret Franques, Russell	Giving Second Chances to Gulf Coast Wildlife
Mardini, Rania Uwaydah Hunter, Mostafa	Activity Based Costing (ABC) Systems for Public Hospital Governance: Managing the Risks of Fraud, Corruption, and Medical Malpractice
Mathwick, Charla	C-Store Disruption: Green Zebra's Recharging Stations for Human Beings
Mitteness, Cheryl Friar, John	Hylux's Use of Market Research
Mitteness, Cheryl	Red Raion's Expansion into the United States
Mohiuddin, Fazla Eshan, Subhat	Strategy at its crossroad: Case of a SME in Bangladesh
Namin, Aidin	The Magic of Packing in the Luxury Consumer Packaged Goods (CPG) Market
Ojha, Sushil	Merger Policy in Nepal and its Impact on Nepal Bank Limited
Rixon, Daphne	Developing Performance Benchmarks for the Cooperative Industrial Sector



<b>Case Author(s)</b>	<b>Start Up Case Title</b>
Rizvi, Syed Aun Haroon, Omair	SAROH Investment Advisory
Shukla, Suwarna Sengupta, Tuhin	Organic India: Social Sustainability through Business Model Innovation
Subrahmanyam, Saroja	Flawless Myanmar
Subrahmanyam, Saroja	Sojourner's Way: New Market Possibilities
Thompson-Abbott, Amanda Gogan, Janis	The Best Seat in the House
Torres, Alejandro Rodriguez, Alfredo	Mederi: From Caterpillar to Butterfly
Yadav, Neetu	IKEA Inc: The India Way
Ziemianski, Pawel	What does ice-cream go with? Entrepreneurial team decision making

# ACCOUNTING, FINANCE, AND ECONOMICS CASES

Cases	Authors
State Bank of India: Reinventing Business	Narender Ahuja
Jim Zeigler, State Auditor of Alabama: Duty vs. Authority	Carolyn Conn Kay Guess
Rules and Standards in Tax Incentives	Michael Jones
Fight or Flight? Non-Compete Agreements in Physician Labor Markets	Michael Jones
Go On – Stay On: Making a College Education Free to all Idaho Residents	Michael McCollough; Steve Peterson, Karin Dial
Why Buy New When Used Will Do? The Case of a Used Car Dealer	Michael Nicholson
Agua Clara, S.A.	Francisco Lopez Lubian
BusBoard Prototype Systems: Making Cents of Foreign Exchange	Brian Lane Craig Wilson
Lockheed Martin and Leidos: A Reverse Morris What?	Susan White Peter Clyne
Zorbas Bakeries (Cyprus): Launching a New Concept Store in New York?	Olga Kandinskaia
Sunar Factory: Investment Opportunity and a Financing Dilemma	Sana Tauseef

# State Bank of India: Reinventing Business

Narender L. Ahuja, IMT Ghaziabad

## **Case Objectives and Use**

This case can be a helpful tool for effective teaching of subjects such as Banks Management, Management of Financial Institutions, International Business and Strategic Management. The main objectives are:

- Engage participants to discuss the emerging issues in managing banks;
- Use financial ratios for SWOT analysis of a service/banking organization;
- Identify key success factors (KSF) in the banking industry, and
- Challenge the participants to generate strategies for sustainable future competitiveness.

## **Synopsis**

This case describes a situation facing the State Bank of India, the 200 years old bank whose predominant position has been threatened by a relatively new and much smaller HDFC Bank. HDFC Bank surpassed the State Bank of India (SBI) in market valuation even though SBI was the largest lender in the country with the size of its balance sheet several times bigger than that of HDFC Bank. SBI was apparently losing business to the competition and this had to change. SBI must reinvent itself quickly to regain its market reputation and ensure long term viability.

The big question was what would it take to turn the tables and where to begin? Before preparing a strategic plan for SBI, it would be necessary to understand the business model of HDFC Bank and its secret of success. A realistic financial SWOT analysis versus the HDFC Bank, based on the Du-Pont model could help in formulating a roadmap to re-build the SBI.

\* Dr. Narender L. Ahuja is Professor of Finance and Banking, IMT Ghaziabad, India. He may be contacted at [nlahuja@rediffmail.com](mailto:nlahuja@rediffmail.com); [nlahuja@imt.edu](mailto:nlahuja@imt.edu). The author is grateful to Professor Dr. Elinda F. Kiss, and TA Noah Miller, of the Department of Finance, Robert H. Smith School of Business, University of Maryland for the suggested editing of the case.

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The case, based on secondary sources of information, is intended to be used as the basis for class discussion rather than to illustrate either effective or ineffective handling of a management 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 4-6, 2018.

# **Jim Zeigler, State Auditor of Alabama: Duty versus Authority**

Carolyn Conn, Texas State University  
Aundrea Kay Guess, Samford University

## **Case Objectives and Use**

This case can be used in an upper-level undergraduate or graduate-level auditing class. It could also be appropriate for a public administration course. It should be noted that there are few teaching cases in which the authority and duties of a state auditor are discussed and very few cases that explain the legal environment in which a state auditor operates, contrasted with an internal auditor in the private sector. Another aspect of this case is the topic of the importance of professional organizations and colleagues to assist an auditor (or other accounting professional) when confronted with a tough professional situation.

After studying this case, students should be able to achieve the following Learning Objectives:

- (1) describe the general duties and sources of authority for a state auditor;
- (2) describe the duties and source of authority of the state auditor in the student's own state;
- (3) describe the duties of a state's attorney general and the interface with the duties of a state auditor
- (4) contrast the duties and authority of a state auditor with an internal auditor in the private sector
- (5) describe the benefits of having professional contacts who serve as a sounding board when an auditor (or other professional) encounters a tough work situation.
- (6) evaluate whether duty may exceed authority and require extraordinary actions to address an egregious situation encountered by an auditor.

## **Synopsis**

It was a global news story for months during and beyond 2010 when BP's Deepwater Horizon oil rig exploded off the coast of Louisiana. The resulting oil spill covered thousands of square miles and damaged the coastlines of several states, including Alabama. The spill destroyed tourism and other industries; bankrupted businesses and citizens lost their livelihoods and savings. A lesser known story is how millions of dollars from legal settlements were not directed as intended. Not all went to repair the damage caused by the oil spill or to the citizens who suffered financial losses. In Alabama, Governor Richard Bentley directed the use of several million dollars for construction of a new \$135 million hotel and convention center as well as \$1.8 million to restore the seaside governor's mansion.

It was with this backdrop that Jim Zeigler spent the first year of his first term as Alabama's State Auditor. With a constitutional charge to protect and account for the state's assets, Zeigler was seriously troubled by the Governor's use of the BP oil monies. Those were not the only activities that Zeigler saw as misdeeds. In March of 2016, Zeigler filed a formal complaint with the Alabama Ethics Commission in which he alleged Bentley and his senior political advisor (also his mistress) had misused state property. In late spring of 2016, Zeigler wondered whether the complaint filed with the Ethics Commission was enough. He was considering whether to file a lawsuit against the governor. Was it Zeigler's duty as State Auditor to take this step? Did he have the authority to file such a lawsuit?

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The authors developed this case, based on actual events, for class discussion rather than to illustrate either effective or ineffective handling of the situation. No aspect of this case is 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 4-6, 2018, Orlando, Florida. All rights are reserved to the authors and NACRA. © 2018 by Carolyn Conn and Audrea Kay Guess. Contact person: Carolyn Conn, Texas State University in San Marcos, Texas. cc31@txstate.edu

# **Rules and Standards in Tax Incentives**

Michael Jones, University of Cincinnati

## **Case Objectives and Use**

The case was written primarily for a Managerial Economics course for MBA students. It would also be appropriate for use in an undergraduate urban and regional economics course or a public economics course. The study questions reflect issues of externalities, tax incentives, labor markets, agglomeration economics, and other relevant economic topics. The objectives are:

- Understand the positive and negative externalities associated with tax incentives
- Assess the financial impact of tax incentive programs on government tax receipts
- Calculate return-on-investment and break-even values
- Describe agglomeration effects and their effect on the economy

## **Synopsis**

In May, 2017, the City of Cincinnati's administration released a memo to City Council to support the approval of a property tax abatement in the Over-the-Rhine neighborhood. A rocky history existed between City administration, media, and City Council regarding these types of economic development incentives. Both City Council and select members of the media requested more stringent rules and standards be in place before voting on the incentives. Little, if any progress, had been made on this issue before City Council needed to vote on the most recent application by John Blatchford. Kevin Flynn, a City Councilmember, was on both the City Council and the Budget and Finance Committee, a subcommittee tasked with reviewing tax abatements. On May 22<sup>nd</sup>, the Budget and Finance Committee would meet to vote on the application, and on May 24<sup>th</sup>, the full City Council would vote.

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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 2018 Conference, Orlando, FL, October 4-6, 2018. © 2018 by Michael Jones. Contact person: Michael Jones, University of Cincinnati, Cincinnati OH, 513-556-2491, m.jones@uc.edu.

# **Fight or Flight? Non-Compete Agreements in Physician Labor Markets**

Michael Jones, University of Cincinnati

## **Case Objectives and Use**

The case was written primarily for a Managerial Economics course for MBA students. It would also be appropriate for use in an undergraduate labor economics course or law and economics course. The study questions reflect issues of labor markets, non-compete agreements, social costs and benefits, law and economics, and other relevant economic topics. The objectives are:

- Understand the justification for non-compete agreements
- Identify the costs and benefits of non-compete agreements
- Define a market using the Standard Occupational Classification (SOC) System
- Define a market using the Quarterly Census of Employment and Wages (QCEW)
- Understand the definition of a Metropolitan Statistical Area
- Calculate a location quotient (LQ)
- Extract data from the Occupational Employment Statistics (OES) and Longitudinal Employer-Household Dynamics programs

## **Synopsis**

Dr. Mario Zuccarello was the former Chair of the Department of Neurosurgery at the University of Cincinnati (UC) and former Vice Chairman of the Mayfield Clinic's board of directors. In 2001, he signed a non-compete agreement that prohibited him from working within a 25-mile radius of any Mayfield Clinic office for two years. After UC and the Mayfield Clinic terminated their affiliation agreement, Dr. Zuccarello intended to continue working with medical residents at UC despite Mayfield's directive that prohibited him from doing so. The two parties could not resolve the issue and they separated in December, 2017. On February 12<sup>th</sup>, 2018, a Hamilton County judge issued a temporary restraining order that prohibited Dr. Zuccarello from practicing medicine in the greater Cincinnati region. Dr. Zuccarello needed to decide his best step. His options included: disputing the enforceability of the non-compete agreement in court, attempting to settle with Mayfield Clinic outside of court, or accepting the non-compete agreement terms of his employment contract.

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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 2018 Conference, Orlando, FL, October 4-6, 2018. © 2018 by Michael Jones. Contact person: Michael Jones, University of Cincinnati, Cincinnati OH, 513-556-2491, m.jones@uc.edu.

# **Go On – Stay On: Making a College Education Free to All Idaho Residents**

Michael A. McCollough, University of Idaho  
Steve Peterson, University of Idaho  
Karin Hatheway-Dial, University of Idaho

## **Case Objectives and Use**

The case is appropriate for undergraduate courses in Cost and Managerial Accounting and in Economics. The objectives are:

- Identify the relevant costs which in turn will be used to conduct a cost analysis in the “Relevant Costs for Decision Making or Incremental Analysis”
- The case could be used in a high level discussion on the impacts of tax policy on state and local economics.

## **Synopsis**

The case revolves around a proposal, the Go On – Stay On (or GoSo) that three members of the University of Idaho have put together for an internal grant proposal to increase the go on rate of high school graduates to post-secondary education. In addition, the GoSo was designed to also increase:

1. the college graduation rate.
2. and the likelihood that these graduates would stay on in Idaho to take a job, and therefore repay the states investment in their education.

While increasing the Go On rate is important, Idaho’s future economy needs citizens with a post-secondary education to meet the needs of current and future employers around the state. This case applies accounting and economic concepts to a proposed policy change that could address a national societal problem which is the constant search for talent to drive the economic engine.

While the GoSo seems unrealistic the team feels that it would be effective, and ultimately pay for itself. The case asks students to analyze the economics of the GoSo case and perform cost calculations to verify their beliefs.

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The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of a situation. The case and teaching note was anonymously peer reviewed for presentation at NACRA 2018 Conference, Orlando, FL, October 4-6, 2018. © 2018 by Michael A. McCollough, Steve Peterson, and Karin Hatheway-Dial. Contract person: Michael A. McCollough, Univeristy of Idaho, 875 Perimter Drive, MS 3161, Moscow ID, 83844-3161, 208-885-7151, [mccollou@uidaho.edu](mailto:mccollou@uidaho.edu)

# Why Buy New When Used Will Do?

Michael Nicholson, University of Technology Jamaica

## Case Objectives and Use

This case is suitable for students in the first year of study of undergraduate Finance. The objectives are:

- Deepen students' understanding of debt and equity and how they influence financing decisions
- Analyse income statement and balance sheet variables as they relate to small businesses
- Exploration of factors influencing type of financing used by small businesses in general and firms in the used-car sector specifically.

## Synopsis

Jetcon Corporation's business is the importation of pre-owned cars from Japan for re-sale in Jamaica. It was a fiercely competitive business as there were, literally, hundreds of companies involved in this sector. There was also a vibrant new-car sector offering the full spectrum of models ranging from the high-end German luxury vehicles, to the mainstream Japanese and Korean offerings. Jetcon, like most small businesses in Jamaica, was experiencing difficulty raising financing in the amounts and cost that it required, and believed further growth was impossible without a major change in its financing arrangements. It was convinced that it had gone as far as it could using only debt financing and the recent establishment of a Junior Stock Market opened the possibility of raising substantial equity capital via an initial public offering (IPO). Such a listing would require significant and costly changes to Jetcon's structure and business methods. If it went ahead, it would be the first used-car dealer to list on the Jamaica Stock Exchange. Management had to decide whether it should sacrifice some of its control over Jetcon's affairs to gain access to equity funding via the Stock Exchange.

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The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of a situation. The case and teaching note was anonymously peer reviewed for presentation at NACRA 2018 Conference, Orlando, FL, October 4-6, 2018. © 2018 by Michael Nicholson. Contact person: Michael Nicholson, University of Technology Jamaica, 237 Old Hope Road, Kingston 6, Jamaica, [mnicholson@utech.edu.jm](mailto:mnicholson@utech.edu.jm)



# **Agua Clara S.A.**

Francisco J. López Lubián, IE Business School

## **Case Objectives and Use**

This case illustrates the different elements that must be considered to make a financial analysis of two projects mutually exclusive, when they have different initial investment and different profile in the expected generation of cash flows.

Specifically, this case allows the discussion of:

- 1) Differential cash flows in projects mutually exclusive
- 2) Estimate the associated economic profitability of these projects
- 3) Consider other qualitative criteria to make the final decision.

This case is aimed at graduate and post-graduate students with knowledge of the basic foundations of valuation of investment projects, and slots perfectly into an Advanced Finance course. This document could also be used in executive education in-company courses or seminars for subjects related to company restructuring and/or investment projects valuation.

## **Synopsis**

Jorge Talavera was confused.

As CFO of the Spanish company Agua Clara S.A., he was responsible for the financial analysis of a new desalination plant his company wanted to build up, to supply drinking water to a large tourist area.

After studying several alternatives, Mr. Talavera was considering two possible investment projects to be set up in Marbella or in Torremolinos, two touristic towns in the Costa del Sol area.

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The author 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, October 4-6, 2018, Orlando, Florida. All rights are reserved to the author and NACRA. © 2018 by Francisco J. López Lubián. Contact person: Francisco J. López Lubián, IE Business School, C/ Maria de Molina, 12, 4<sup>th</sup> floor 28006 Madrid. Spain. [fco.lubian@ie.edu](mailto:fco.lubian@ie.edu).

# **BusBoard Prototype Systems: Making Cents of Foreign BusBoard Prototype Systems**

Brian Lane, University of Saskatchewan  
Craig Wilson, University of Saskatchewan

## **Case Objectives and Use**

The BusBoard Prototype Systems (BPS) case is targeted toward classes in financial risk management and corporate finance, for third and fourth year undergraduate classes and for MBA classes. It was tested in an MBA corporate finance course in March 2018 and was well received - students found the case useful in developing their understanding of the risks of currency exchange, in addition to learning about the tools available for managing these risks. In the case, several currency translation issues are addressed. The first looks at BusBoard's overall exposure to the U.S. dollar. As a Canadian company conducting transactions in USD, students must consider BusBoard's overall exposure to changes in the value of the USD. At first glance, students are tempted to look at the company's total U.S. dollar business volume, but the actual exposure is much less due to a natural hedge. Exercises are included to reinforce this point, and to give students opportunity to discuss and consider other hedging methods. These include futures contracts, calls, and puts.

## **Synopsis**

BusBoard Prototype Systems (BPS) had traditionally managed foreign currency transactions on a day-by-day basis. The general manager attempted to buy and sell USD at times that maximized the company's value, but exchange rate volatility put constant pressure on her ability to make the best choice, and the company paid its suppliers and received payment from customers in USD. One particular 2017 transaction is highlighted, where BPS ordered \$10,775 USD of parts and supplies from a Taiwanese supplier, with 50% payment due on contract negotiation and the remaining 50% due on delivery. BPS partners were interested in developing a more strategic approach to managing currency translation transactions. The general manager wondered how BPS could benefit from changes in how the company currently dealt with foreign currency.

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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 2018 Conference, Orlando, FL, October 4-6, 2018. © 2018 by Brian Lane and Craig Wilson. Contact person: Brian Lane, University of Saskatchewan, 25 Campus Drive, Saskatoon, Saskatchewan, Canada, S7N 5A7. Phone: 306-966-8425, Email: brian.lane@usask.ca

# **Lockheed Martin and Leidos Holdings: A Reverse Morris What?**

Susan White, University of Maryland  
Peter Clyne, Leidos Holdings

## **Case Objectives and Use**

This case is appropriate for an MBA or undergraduate finance elective. It is very appropriate for restructuring courses, as the Reverse Morris Trust has gained popularity because of the tax benefits it provides. This case was used in an advanced financial management course for undergraduates. Investments instructors can also make use of the case since it involves a portfolio decision, whether to continue to invest in Lockheed Martin, or to exchange Lockheed shares for Leidos shares. The case would be particularly useful in a capstone finance course where students are expected to apply multiple finance disciplines. Instructors can tailor their assignment of the discussion questions based on what they wish to emphasize in the case. Students are expected to value the Reverse Morris Trust transaction using discounted cash flow and comparable multiples analysis, and calculate an appropriate weighted average cost of capital. Students will also evaluate investment options created by an unusual merger and acquisition strategy, and evaluate a company's profitability and financial health

## **Synopsis**

Lockheed Martin made a strategic decision to divest its Information Systems and Global Solutions (IS&GS) division, which engages in consulting, largely defense and other governmental agency consulting. In order to structure the divestiture as a tax-free transaction, Lockheed Martin used a Reverse Morris Trust, a complex mergers and acquisition transaction, which required the creation of a new company and a merger with a second company, Leidos. There were a number of conditions that needed to be met, for example, shareholders of the parent company division (IS&GS) needed to own more than 50% of the resulting company. The case is told from the point of view of Peter Clarke, a Riverbend Partners hedge fund portfolio manager, whose investment committee has invested in Lockheed Martin, based on his recommendations and research. He recommended Lockheed Martin as a promising company largely because he believed the enterprise IT, cybersecurity, intelligence, health IT, and engineering business was a good growth area. Now, Lockheed was divesting itself of this division. Lockheed Martin shareholders could choose between staying with post-divestiture Lockheed Martin or accepting shares in Leidos. Now, in mid-2016 when a decision needs to be made, Clarke needed to make a recommendation to his investment committee about what would provide the most value for Riverbend investors.

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# **Zorbas Bakeries (Cyprus): Launching A New Concept Store In New York?**

Olga Kandinskaia, CIIM Cyprus International Institute of Management

## **Case Objectives and Use**

This case is ideal to expose MBA students to a wide range of issues related to the strategic investment decision process covered within the Corporate Finance course or similar. The focus of this case is on capital budgeting: students are taken step-by-step through a financial modeling exercise in Excel, which allows them to acquire both theoretical knowledge and practical skills. This case highlights that the standard NPV analysis does not take into account the flexibility inherent in the capital budgeting process, and more specifically in this case, the opportunity to expand in the future via franchise. The case intends to introduce students, in a relatively easy way, to the rather complex but increasingly important concept of ‘real options’ in finance. The objectives are:

- 1) Construct a financial planning model in Excel (using the template Excel file) and perform a financial appraisal analysis of a decision situation
- 2) Demonstrate knowledge and comprehension of both financial and non-financial considerations that would be critical in this decision
- 3) Apply the concept of ‘real options’ to this case
- 4) Evaluate the decision situation via SWOT analysis

The case is accompanied by the Zorbas Template Excel file (for students) and the Zorbas Solutions Excel file (for the instructor).

## **Synopsis**

Zorbas Case presents a decision situation. The case setting is Nicosia (Cyprus, EU), December 2014. Zorbas Bakeries, a large and established local company, was considering a new strategic initiative: open a new concept store abroad in a major big city, such as New York. Moreover, it wasn't just about opening one shop, but the shop that would be used as the pattern for the future international franchise stores. Such a project would be most unorthodox for a local Cypriot company and involve multiple risks. The Managing Director of the company Mr Demetris Zorbas was assigned responsibility for this project. He led the team which had many issues to consider and a lot of preparatory work to do, and ultimately, finalize the plan and present it to the Board of Directors for the final approval. “Are we fully ready to go to New York? Will we be able to compete in this highly antagonistic market? What are our strengths that directly support this project? What are our weaknesses that may lead to the failure of this project, and what can we do about them? What threats are we facing, and how can we deal with those risks? What are the opportunities and how can we take advantage of them? What are the projected financials for the new “test case” store? Will this project add value to the company?”

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# **Sunar Factory: Investment Opportunity and a Financing Dilemma**

Sana Tauseef, Institute of Business Administration (IBA), Karachi

## **Case Objectives and Use**

This case is designed for the undergraduate or graduate students for the courses Financial Management, Corporate Finance or Entrepreneurial Finance. The students doing the case must have a good knowledge of financial forecasting, capital budgeting, free cash flows and capital structure. The integrative nature of the case will give an opportunity to the students to apply the skills and tools in many areas of financial management/corporate finance in a single real world management situation. The case requires the students to project the financial forecasts and apply the capital budgeting tools to evaluate the feasibility of the new investment. The case will also help students understand and compare the qualitative and financial costs and benefits involved in different financing alternatives and identify the best financing alternative for the given situation.

## **Case Synopsis**

After taking over his small family business of jewelry manufacturing located in Saddar, Karachi, Jawwad Karim chose to open the business to customers rather than manufacturing the jewelry for big jewelry retailers in Karachi. Based on the affordable rates, certified gemstones and rigorous marketing, Jawwad was able to attract sizable customer base for his business, Sunar Factory, and grow the margins substantially in three years.

In May 2018, Jawwad decided to purchase an X-ray Fluorescence (XRF) Gold Testing Machine and offer the gold testing service to customers. Since he would be the first jeweler in the city to use an XRF machine to certify the gold content of the jewelry for customers, he expected to attract a large volume gold buying transactions and earn good returns on his investment. However, with zero personal savings, purchasing the machine would require an external financing. Jawwad had been exploring three possible sources of financing: bank loan, angel investment and a loan offered by a customer, and needs to understand the positive and negative financial impacts of each before selecting the alternative that best fits the situation.

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# DIGITAL TECHNOLOGIES AND OPERATIONS CASES

Cases	Authors
Ajax Paving Inc.: A Training and Development Opportunity	Haylee Luedtke Lisa Eshbach
Global Tech Customer Relations Management Software Integration Project: Challenges of Information System Consolidation	Jane Gravill Cody Petrosino
Langdon Art Institute: Star Enterprise Resource Planning Software Implementation Challenges	Jane Gravill Cody Petrosino
Walked into a Lamppost: A Coding Compliance Crisis	Samantha Champagne Kristen Gallagher

# Ajax Paving Industries, Inc.: A Training and Development Opportunity

Haylee Luedtke, Ferris State University  
Lisa Eshbach, Ferris State University

## Case Objectives and Use

The case is written to provide the necessary information to create a training and development program within a time-constrained context, with no previous policies, and in a small business environment. It is valuable because the case provides only the minimal necessary information to create a training and development program for the company within the given industry context. This allows the students to use their knowledge and experiences to create a wide variety of solutions for the provided problem - what is the best way to add formal processes in place to ensure the knowledge is protected and new project managers can be set up to take over for the senior project managers in the future? Professors should ensure their students have an understanding of creating training and development processes as well as the efficiencies these can provide for a company.

This case can be used in conjunction with teaching Lean methodologies, specifically the Training Within Industry (TWI) area. Through this training program there is a great opportunity to provide structure and reduce waste in the current process. However, concepts could be applied to teaching Training and Development from a Human Resources perspective as well. This case would be useful in upper-level undergraduate courses relating to Lean methodologies, specifically TWI, or a human resources management course focused on training and development/needs assessment.

Specific case objectives include:

1. Assess the need for a training and development program based on the current state and the culture and norms.
2. Design a training and development program.
3. Evaluate the cost, benefits, and drawbacks associated with implementing the training and development program.
4. Determine the coaching/mentoring techniques required with Lean implementation.

## Synopsis

Ajax Paving Industries, Inc., or simply Ajax, was a paving company that served the Metro-Detroit area in paving major highways, testing facilities, and airport runways since 1951. The scope and complexity of their projects have grown throughout the years. In recent years, the company has hired many new employees to assist on the ever-increasing number of projects and to prepare the next generation of project managers as the senior project managers have retirement on their near horizon. The rapid expansion and an ever more demanding project load, for the upcoming season, has the Human Resource manager, Katie Schmidt, looking to establish proper training and development processes in January 2017. The intent is to quickly onboard and transfer the valuable knowledge from the senior project managers to the new project managers. But how does a single Human Resource manager create an entire training and onboarding process for a company that has never had a formal policy? Also add in the constraint of getting it operational within a three-month period.

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# **Globaltech Customer Relationship Management Software Integration Project: Challenges of Information Systems Consolidation**

Cody Petrosino, Student Author, Wilfrid Laurier University, Lazaridis School of Business &  
Economics

Jane Gravill, PhD, Faculty Author, Conestoga College ITAL, School of Business

## **Case Objectives and Use**

This disguised case, based upon actual events, can be used in Information Systems (IS) and Project Management courses. The main objectives of the case are:

1. Gain a better understanding regarding the project management-related challenges involved in IS integration projects and managing the software development lifecycle.
2. Learn how to evaluate criteria important relevant to managing IS integration projects and the software development process.
3. Explore approaches that project managers can apply to help ensure that systems integration and software development projects are managed effectively.

## **Synopsis**

Cody Jones, a Project Coordinator with GlobalTech looked out the window from his office reflecting on the past few months and the rollercoaster series of events surrounding the Coalesce Customer Relations Management (CRM) project. The project had started as a simple data clean up and consolidation of various CRM instances but had snowballed into a potential systems integration catastrophe involving all main business units within the firm. After only a short few months into the project, significant progress was made. However, the project's progress came at the cost of the IT organization's relationship with the business units, causing issues with the continuation of the rest of the project.

Tim was an experienced and knowledgeable Project Manager who had been with GlobalTech for a decade, and was a mentor to Cody. It became clear to both Tim and Cody that the large CRM Integration project was in trouble. Momentum within the project team was slowing with important deadlines missed, and little-to-no systems development progress. The two project leaders desperately needed to find a way to get the project back on track and across the finish line before it was cancelled and all their hard work integrating the systems written off as a sunk cost. Some business units were in favor of the integration project and some were not, causing additional project management challenges. Cody and Tim needed a plan to get the business units on board and launch the project back into gear, but where should they start?

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# **Langdon Art Institute – Star Enterprise Resource Planning Software Implementation Challenges**

Cody Petrosino, Student Author, Wilfrid Laurier University, Lazaridis School of Business & Economics

Jane Gravill, PhD, Faculty Author, Conestoga College ITAL, School of Business

## **Case Objectives and Use**

This disguised case is based upon real events and can be used in Information Systems Management, Project Management or Procurement courses. The main objectives of this case are to help undergrad students gain a better understanding of the Procurement process, Vendor Relations Management and System Development Life Cycle applied in the case. Students should also gain a better understanding of the benefits and risks of outsourcing and the types of criteria that are important to evaluate when making Make versus Buy software-related decisions. Students are challenged to address the sunk cost fallacy when making decisions.

## **Synopsis**

On an overcast day in January 2018, Josh, President of STAR, a student-run service group within the Langdon Art Institute (LAI), and his old colleague, Andrew, met at the corner coffee shop to catch up on recent events. For two years, Josh worked for Andrew at STAR. Months ago, Andrew had made the decision to leave the STAR organization and search for new challenges, while Josh continued to rise through the ranks at STAR. Josh had asked Andrew to join him for coffee as he urgently needed Andrew's help to solve a critical problem within the STAR organization regarding their central Enterprise Resource Planning (ERP) software system.

During the coffee shop conversation, Josh complained to Andrew, "I don't know what to do! The ERP system has so many issues at this point we need to decide whether to sink more money into the project or to buy a new off-the-shelf product since the customized product has been nothing but headaches for two years. But we have invested so much money and so much time into this ERP project I hate to throw it all away and start all over again. I need to make a recommendation to the Board next week about what to do going forward. Hopefully this meeting goes better than the time you told them about the issues you were having with the ERP. What do you think I should do?"

Listening to Josh vent about the current issues with STAR's ERP system and his reference to Andrew's past meeting with the Board regarding the same troublesome ERP system, Andrew reflected upon the meeting 2 years ago when he told the Board that the ERP software project was in big trouble.

It was February, 2016, during a monthly LAI board meeting. The Chair of the Board addressed the room, "Now for the next item of the agenda, our Vice-President of Logistics for the STAR group, Andrew Johnson, will provide an update on the status of the STAR ERP project implementation. Over to Andrew."

Andrew stood and addressed the Board, "First, I would like to address a situation that occurred earlier this month. I received a message from our VP of Customer Service explaining that there was another issue with the ERP system, making it imperative for us to make a strategic decision immediately regarding the future of this unstable ERP software system that serves our entire student body. We are continuing to have with performance degradation and there is a real need to address this unstable ERP software problem."

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# **Walked Into A Lamppost? - A Coding Compliance Crisis!**

Samantha Champagnie, University of South Florida  
Kristin Gallagher, University of South Florida  
Janis Gogan, Bentley University  
Matt Mullarkey, University of South Florida

## **Case Objectives and Use**

The case, targeted for use in senior-level undergraduate or MBA Strategic IT Management course, offers an opportunity for students to identify and consider project risks that an organization faces at the start of a complex IT project with a vendor, and to consider steps the organization can take to mitigate those project risks. Key learning objectives are:

- Use risk assessment techniques to identify probability and impact of business risks.
- Use PEST analysis to identify external factors that are favorable or unfavorable to an organization, and internal assets and capabilities (resources) that are relatively strong, weak, or missing.
- Identify IT Project risks (such as time pressure, use of emerging technologies, and external vendor risks) and implement controls and supports to mitigate them

## **Synopsis**

Medical coding compliance is challenging for healthcare providers, who must navigate a complex rule-based billing and reimbursement system. This disguised case describes a real organization that plans to leverage new technology to address this complex problem. In spring 2018, Texas Physician Group (TPG), a large Physician Group in San Antonio Texas – plans to improve their medical coding accuracy.

In recent years, the United States Center for Medicare and Medicaid Services (CMS, a branch of the United States Department of Health and Human Services) had increased its compliance auditing, in attempts to both deter and detect fraud and to recoup monies previously paid out for erroneous or fraudulent claims. Providers or organizations found guilty of fraud or abuse faced severe civil and criminal penalties.

The results of TPG's internal audits, combined with external audits by government agencies pointed to vulnerabilities in their coding compliance processes, and now TPG was seeking a reliable and cost-effective solution to address these concerns. To that end, the company had recently signed a contract with a healthcare IT vendor to develop a solution to their coding compliance problem.

The protagonist, McMahon –hired four weeks previously -- is responsible for coding compliance, in her role as Vice President of the Central Business Office. McMahon is concerned that the vendor's proposed solution will rely on AI-based software that has not previously been tested in the planned context. McMahon has to determine if the project is too risky to proceed or whether she can manage and mitigate the risks inherent in the project.

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This disguised case, based on real people and actual events in a real organization, was developed 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 2018 Conference, Orlando, FL, October 4-6, 2018. © 2018 by Samantha Champagnie and Kristin Gallagher. Contact person: Samantha Champagnie, University of South Florida, Tampa FL, 210-887-3784, champagnie@mail.usf.edu.

## CASES WRITTEN IN FRENCH

Cases	Authors
Bewöod : Nœuds Papillon Et Accessoires En Bois Comment Piloter La Politique Tarifaire D'une Start-Up ?	Sabine Ruaud Hervé Didier
Le Chocolat Des Français : Quel Concept-Store Pour Croquer La Planète Et La Faire Fondre De Plaisir ?	Sabine Ruaud Véronique Boulocher
Pour Vous Dépanner, Allovoisins Actionne 10 Millions De Sonneries !	Catherine Lejealle
Cora Nancy, Le Challenge Des Produits Locaux	Christine Kratz Michel Makiela
L'aventure Entrepreneuriale Les Bouchons	Franck Bares Catherine Beaucage Sabrina Hombourger-Bares
Les Biscuits De Mr Laurent	Jeanine Botuha-Billet Christine Kratz
L'Arpcg Au Maroc : Comment Commercialiser Un Couscous Local Authentique Sur Le Marché National ?	Abdellatif Ait Heda Soumiya Mekkaoui
Crowdfunding Immobilier A Ploemur : Investissement A Risque Conséquent Ou Mesuré ?	Laurent Herve Imen Mejri

# **Bewööd : Nœuds Papillon Et Accessoires En Bois. Comment Piloter La Politique Tarifaire D'une Start-Up ?**

Sabine Ruaud, Edhec Business School, Lille, France

Hervé Didier, Edhec Business School, Lille, France

## **Case Objectives and Use**

Ce cas vise à montrer que le prix est une variable singulière qui associe une forte tangibilité et des mesures très rationnelles à des effets perceptuels. La détermination d'un prix mobilise de multiples concepts d'étude marketing, présentant des degrés de difficultés divers. Il permet donc d'illustrer les différentes approches de fixation du prix d'un produit à partir des informations comptables (point mort, taux de marge souhaité) et des résultats d'études de marché (prix psychologiques et marché test).

Selon la taxonomie de Bloom, les apprenants vont devoir :

- comprendre la problématique d'une start-up dans son environnement de référence,
- expliquer comment le concept prix s'intègre dans la démarche marketing et la stratégie d'entreprise,
- rechercher les méthodes de fixation de prix les plus adaptées,
- évaluer les résultats issus de ces différentes approches,
- décider de la politique tarifaire la plus pertinente à construire,
- recommander des axes stratégiques à prioriser concernant la pratique tarifaire.

En outre, ce cas place les apprenants en situation quasi-professionnelle. Il les invite à réfléchir de manière rigoureuse aux choix stratégiques et opérationnels à mener par une entreprise, en l'occurrence une start-up.

## **Synopsis**

BEWÖÖD souffle ses 3 bougies... En ce mois anniversaire de mars 2018, Laury Bonjean, la trentaine, originaire du Nord de la France, se remémore avec émotion le chemin parcouru jusqu'au lancement de sa start-up devenue aujourd'hui une marque référence dans le domaine du bijou et des accessoires en bois. Elle se revoit enfant, à l'âge de huit ans, en train de fabriquer des meubles pour ses poupées Barbies® sous le regard bienveillant et avisé de son Papa. Il lui a enseigné comment travailler ce matériau naturel, renouvelable et biodégradable. Il lui a appris à utiliser la perceuse et à manier la scie sauteuse. Et, vingt ans plus tard, elle a ressenti une envie de se réaliser pleinement. Elle met alors toute sa pugnacité à relever un défi un peu fou : façonner à la main ses propres pièces boisées originales, découpées et gravées au laser, 100% made in Hauts-de-France. Une première création avec Mr Divergent, un noeud papillon en bois devenu le best-seller de sa collection. D'ailleurs, ses clients la pressent pour qu'elle étoffe son offre et leur propose un coffret avec trois rubans afin de faire en sorte que le noeud central soit amovible et qu'ils puissent le personnaliser. La Fête des Pères est dans trois mois. Quel prix fixer sachant que, dans le contexte actuel d'hyper-concurrence, il s'agit d'une variable stratégique clé ? Quelle méthode privilégier ? Comment formuler le positionnement prix ? De plus, pour se démarquer et résister à la concurrence, elle envisage de mettre en place la BEWÖÖD Box Homme, une vente par abonnement pour les nœuds en tissu. Laury a conscience qu'elle ne peut plus continuer à déterminer ses tarifs de manière hasardeuse-pifométrique. Elle doit réfléchir en urgence à l'élaboration d'une politique prix qui lui permette d'optimiser astucieusement rentabilité et croissance de sa start-up.

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# **Le Chocolat Des Français : Quel Concept-Store. Pour Croquer La Planète Et La Faire Fondre De Plaisir ?**

Sabine Ruaud, Edhec Business School, Lille, France  
Véronique Boulocher-Passet, Brighton Business School, UK

## **Case Objectives and Use**

Ce cas place les apprenants en situation quasi-professionnelle. Il les confronte à une situation très courante lors du développement d'une start-up ou d'une entreprise plus généralement : comment trouver des relais de croissance une fois le modèle initial déployé ? Les apprenants doivent faire face à la complexité de la problématique du branded-retail et du marketing expérientiel. Ils sont invités à réfléchir de manière rigoureuse aux choix stratégiques et opérationnels d'une entreprise qui souhaite ouvrir un premier lieu de vente.

Plus précisément, selon la taxonomie de Bloom, ils vont devoir :

- comprendre la problématique d'une entreprise dans un environnement de référence,
- expliquer les avantages et inconvénients d'opter pour une stratégie multicanal,
- établir les bénéfices et les risques, pour une jeune start-up, à créer une boutique physique,
- évaluer les opportunités d'utiliser le point de vente comme lieu d'expériences,
- recommander des propositions réalistes, tout en tenant compte des contraintes organisationnelles et financières d'une entreprise à ses débuts

## **Synopsis**

Le Chocolat des Français s'est imposé de manière assez naïve. Contrairement à moult marques qui revendiquent employer le Meilleur Ouvrier de France chocolatier-confiseur, cette start-up mise de manière très culottée sur le Bon, le Beau et le made in France. En effet, elle associe un chocolat de grande qualité, 100% hexagonal, à une démarche picturale et créative.

Ses produits étant essentiellement vendus des points de vente sélectifs et via le net, elle envisage l'ouverture d'une première boutique en nom propre à Paris, soucieuse d'apporter une preuve de crédibilité aux partenaires étrangers mais aussi de créer un lien émotionnel avec ses clients. Toutefois, comment faire de ce concept-store un lieu expérientiel qui permette d'inscrire la marque dans une consommation moderne et gagner en désirabilité ? Quelle valeur ajoutée différenciatrice, fonctionnelle ou émotionnelle, permettrait de se démarquer du secteur marchand traditionnel ? Comment construire une ambiance autour de la marque ?

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# **Pour Vous Dépanner, Allovoisins Actionne 10 Millions de Sonneries!**

Catherine Lejealle, ISC Paris

## **Case objectives and use**

### **Synopsis**

AlloVoisins est un réseau social de voisins fonctionnant sous forme de plateforme de locations d'objets et de services entre particuliers. En mai 2017, avec sept mois d'avance sur les prévisions, elle a franchi le cap du million de membres et est désormais la première plateforme d'économie collaborative de ce type. Mais Edouard n'entend pas se reposer sur ses lauriers.

En ce 17 octobre 2017, le CEO prépare son futur rendez-vous avec des actionnaires potentiels début septembre et s'interroge : « Nous enregistrons sur notre réseau social 3250 nouvelles inscriptions par jour. Ceci démontre toute la force, l'efficacité de la solution que nous mettons à disposition de tous les Français adeptes de la consommation collaborative. Le cap des 2 millions semble jouable d'ici la fin de l'année mais comment atteindre notre objectif de 10 millions de membres pour 2020 ? Quelles stratégies mettre en place pour convertir au plus vite et à défaut au moins être visibles ? »

Pour séduire les investisseurs, il faut rassurer sur la capacité à convertir les inscrits ou à défaut à en attirer davantage. Augmenter le nombre de transactions passe aussi par une incitation des inscrits actuels à utiliser davantage de services. A cet égard, AlloVoisins présente des avantages que n'ont pas les plateformes monoservice (autopartage, baby sitting...). En effet, chacun peut aussi bien être offreur que demandeur de services et couvrir une large palette de services. Cet avantage divise potentiellement les coûts d'acquisition par deux. C'est aussi pour cela que le CEO parle plutôt de réseau social que de plateforme. AlloVoisins rencontre moins de problèmes de déséquilibre entre faces mais l'incitation à passer d'un rôle à l'autre n'a pas été pensée à ce jour, pas plus que l'incitation à utiliser d'autres services. A ce jour, un inscrit reste cantonné à un type de service dans un rôle donné (offreur ou demandeur). Rendre la communauté active est alors pertinent pour les inciter à passer d'un rôle à l'autre et à essayer d'autres services. Par conséquent, sans que ce soit aussi prioritaire que la conquête de nouveaux voisins, la fidélisation et l'activation des voisins existants est à travailler. Profiter de leur pouvoir de prescription via des parrainages est également à faire mais ce n'est pas l'objet du cas.

Attirer davantage et conquérir passe par la visibilité qui est actuellement insuffisante. En effet, dès que les gens connaissent AlloVoisins, ils l'utilisent et sont satisfaits. Certes, il faut leur donner des idées d'utilisation pour susciter le réflexe mais le manque de notoriété est la priorité à résoudre... ou alors faire les deux en même temps, en présentant AlloVoisins via des cas concrets.

En résumé, trois axes sont à envisager :

- Visibilité pour attirer sur le réseau social
- Communauté active pour inciter à utiliser le réseau social et changer de rôle ou de type de services
- Stratégies B2B2C

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# **Cora Nancy, Le Challenge Des Produits Locaux**

Christine Kratz, ICN Business School (France)

Michel Makiela, ICN Business School (France)

## **Case Objectives and Use**

Ce cas, conçu en étroite collaboration avec la direction de l'entreprise, a l'avantage de mettre les apprenants en situation, dans un contexte professionnel, avec des données et une problématique réelles. Il met l'étudiant dans la position d'un directeur de GMS qui doit analyser une opportunité de développement d'une catégorie de produits et arbitrer sur les actions pertinentes en matière de marketing mix pour mener à bien la stratégie retenue.

La présente étude de cas est appropriée dans un cours de stratégie (diagnostic stratégique), ou de marketing en faisant un focus plus spécifique sur une thématique de management de l'offre commerciale (de produits locaux) ou de distribution (mix du point de vente).

Les objectifs pédagogiques visent à :

- Maîtriser le diagnostic stratégique ;
- Gérer et organiser l'information
- Comprendre la problématique d'un assortiment et de sa valorisation ;
- Appréhender le marché des produits locaux et ses spécificités (tendances de consommation, les enjeux pour les enseignes...) ;
- Caractériser la nature de l'environnement ;
- Développer des recommandations managériales ;
- Maîtriser les différentes composantes du marketing mix d'un point de vente

## **Synopsis**

Des études récentes montrent que les consommateurs souhaitent privilégier de plus en plus l'achat de produits alimentaires locaux. Ce cas propose de voir comment une enseigne comme Cora peut exploiter cette opportunité et en particulier comment l'hypermarché Cora à Nancy peut devenir le magasin référent dans sa zone de chalandise.

Les enseignes de Grandes Surfaces Spécialisées (GSA) considèrent le marché des produits locaux à la fois, comme un relais de croissance et comme un moyen d'améliorer leur image en tant que partenaire des petits producteurs tant sur le plan national qu'au niveau local.

Ce cas permet de voir ce qui ressort du positionnement de l'enseigne au niveau national et ce qui se joue au niveau du magasin (marketing mix de point de vente).

Les apprenants sont amenés à faire la part des choses entre l'opportunité de développement de chiffres d'affaires sur cette thématique « locale » sur les différentes catégories de produits et les bénéfices en matière d'image au niveau de l'enseigne (vis-à-vis des clients et des autres parties prenantes de la zone de chalandise du magasin).

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# **L'aventure Entrepreneuriale Les Bouchons**

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Catherine Beaucage, HEC Montréal (Canada)  
Sabrina Hombourger-Barès, Université TÉLUQ (Canada)

## **Case Objectives and Use**

Cette étude de cas s'adresse à des étudiants en fin de premier cycle universitaire ou à de jeunes entrepreneurs. Il s'intègre en tant que cas de synthèse ou cas fil rouge à des cours en entrepreneuriat et accompagnement de projets de création d'entreprises. Elle aborde les approches du « Design Thinking » et du « Lean startup » et permet de manipuler deux outils incontournables : les canevas de la proposition de valeur et du modèle d'affaires (Osterwalder et Pigneur).

À l'issue de cette étude de cas, les étudiants seront en mesure de :

- Préciser les différentes étapes du processus entrepreneurial
- Expliquer les approches du « Design Thinking » et du « Lean startup » ainsi que leurs apports dans la formalisation du projet entrepreneurial
- Employer les canevas de la proposition de valeur et du modèle d'affaires d'Osterwalder et Pigneur
- Élaborer des Personae afin de mieux circonscrire les profils et les besoins des clients potentiels
- Défendre un projet entrepreneurial auprès de différentes parties prenantes

L'évaluation de cette étude de cas est tantôt sommative, tantôt formative, dépendamment des activités proposées et des choix de l'animateur.

## **Synopsis**

Étudiant à HEC Montréal, sommelier de formation, employé à la Société des Alcools du Québec et entrepreneur dans l'âme, Nicolas souhaite lancer une entreprise dans le domaine qui le passionne, le vin.

À son retour d'échanges, Nicolas entame une année de spécialisation en entrepreneuriat. C'est en janvier 2016 qu'il rejoint la première cohorte du parcours Entrepreneuriat Rémi Marcoux. Cette année marque le début de son aventure entrepreneuriale.

Lors de discussions informelles avec son ami Xavier, étudiant en design à l'Université de Montréal, une idée prend forme. Xavier amène Nicolas à voir la création d'entreprise dans une optique de résolution de problèmes en lien avec sa passion. C'est ainsi que Nicolas identifie ce qui sera au cœur de son projet de création d'entreprise : le conseil utile dans l'univers du vin!

C'est donc autour de cette problématique que les deux associés lancent leur entreprise : Les Bouchons. Reste pour eux à clarifier la proposition de valeur et designer un modèle d'affaires rentable, capable de s'inscrire dans le marché monopolistique du vin au Québec pour ensuite se développer aux États-Unis. Parviendront-ils au bout de leur aventure entrepreneuriale?

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# Les Biscuits de Mr. Laurent

Jeanine Botuha-Billat, GROUPE ESC PAU  
Christine Kratz, ICN Business School

## Case Objectives and Use

Ce cas d'entreprise réalisé sur une PME artisanale de terroir a été rédigé pour des enseignements en entrepreneuriat et stratégie, pour des étudiants / apprentis en Sciences de Gestion, niveau Master (M1 et M2), ainsi que des stagiaires de la formation continue, en Master spécialisé.

Le cas a pour objectif d'amener l'étudiant à réfléchir sur :

- « Comment agit l'entrepreneur », en s'appuyant sur la théorie de l'action développée par Christophe Schmitt<sup>1</sup> à partir de « l'Agir Entrepreneurial ».
- le processus entrepreneurial, en faisant référence au principe d'Effectuation (SARASVATHY S, 2001)<sup>2</sup>
- les particularités d'une PME artisanale de terroir, à partir du modèle Ressources et Compétences (BARNEY, 1991).

Ce cas :

- va permettre à l'étudiant de s'approprier les apports académiques en stratégie et entrepreneuriat, à partir de l'étude d'une PME artisanale de terroir.
- place l'étudiant en situation d'analyse d'un processus entrepreneurial,
- fait appel à l'intelligence collective qui développe : « l'apprendre à entreprendre ».

## Synopsis

2018, Philippe LAURENT, artisan-producteur, est devant ses fourneaux, comme chaque jour, depuis le démarrage de cette fabuleuse aventure : « Les Biscuits de Mr. Laurent » et il se remémore son parcours :

« Que de chemin parcouru, depuis mon arrivée sur Pau, il y a 18 ans, pour moi ancien saxophoniste lillois ! C'est vrai que j'ai pu faire de mon violon d'Ingres, la pâtisserie, mon métier. J'ai commencé en fabricant des biscuits sablés et je n'ai eu de cesse que d'innover dans ma fabrication, en m'inspirant des valeurs du territoire et du patrimoine béarnais, pour créer des biscuits originaux, tels que mes fameux Cookies de « la mort qui tue. Aujourd'hui, j'ai 2 magasins, dont l'un sur Pau près du Château, et l'autre à Idron<sup>3</sup>, mon atelier de fabrication, mais je suis à l'étroit et ma clientèle augmente. Le maire de la commune voisine me propose un terrain pour construire un nouveau site de fabrication dans une petite zone commerciale, en bordure de route ? C'est hyper visible, mais ce sont des coûts financiers importants ! »

Philippe s'interroge : « J'ai entendu parler de tourisme industriel, est-ce une opportunité à saisir pour cette nouvelle usine ? Vais-je avoir la même maîtrise sur ma fabrication qui fait mon originalité ? Que dois-je faire ? Est-ce une bonne idée ? Ou faut-il que je développe une autre opportunité ? »

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# **L'Arpcg Au Maroc : Comment Commercialiser Un Couscous Local Authentique Sur Le Marché National ?**

Abdellatif Ait Heda, ENCG, Université Ibn Zohr Agadir  
Soumiya Mekkaoui, ENCG, Université Ibn Zohr Agadir

## **Case Objectives and Use**

Ce cas peut être utilisé dans un cours de marketing général ou dans un cours de communication marketing en relation avec les thématiques de l'Economie Sociale et Solidaire et des produits authentiques.

Les objectifs pédagogiques du cas sont:

- Analyser la situation du produit par le recours à l'outil de synthèse qui est le SWOT.
- Considérer les choix possibles en matière de stratégie de communication marketing avec la contrainte financière.
- Formuler des recommandations en terme de marketing éthique et identitaire ;

## **Synopsis**

Ce cas, basée sur une situation réelle des coopératives féminines de couscous au Maroc, décrit l'émergence de ces nouvelles formes organisationnelles et les contraintes commerciales auxquelles elles doivent faire face Rachida Doudjane a crée l'Association Régionale des Productrices du Couscous de Guelmim (ARPCG). Cette association est constituée de 16 coopératives, qui regroupent 205 femmes. Deux objectifs animent cette initiative : professionnaliser la production d'un couscous authentique spécifique à la province de Guelmim au Maroc : le couscous khoumassi (multi céréales) et améliorer les rentrées d'argent des femmes des coopératives via la commercialisation du couscous khoumassi à l'échelle nationale. Après deux ans de travail, le premier objectif est atteint, mais la commercialisation de ce produit ne dépasse pas les 10% des 4 tonnes produites mensuellement par les coopératives. Rachida décide donc de mettre en place une stratégie de communication marketing pour faire connaître le produit et augmenter les quantités vendues au niveau national.

Rachida est consciente des atouts authentiques de son couscous, qui s'alignent parfaitement sur les nouvelles tendances alimentaires nationales. Elle est également consciente de la concurrence rude que présente le couscous industriel, vu les moyens financier dont disposent le grandes marques. Le porte-feuil client de l'ARPCG s'est constitué par le bouche à oreille et la recommandation du couscous khoumassi auprès des particuliers; mais Rachida décide de professionnaliser sa communication et de viser d'autres cibles sur le marché national. Quelle stratégie de segmentation et de ciblage l'ARPCG doit-elle adopter pour commercialiser le couscous khoumassi ? Quels outils de communication doit-elle mobiliser pour atteindre ses objectifs ?

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# **Crowdfunding Immobilier À Ploemeur : Investissement À Risque Conséquent Ou Mesuré ?**

Laurent Hervé, NEOMA Business School  
Imen Mejri, NEOMA Business School

## **Case Objectives and Use**

Ce cas s'adresse à un public de formation initiale de niveaux M1, M2, Mastères spécialisés et MBA. Il peut être aussi utilisé dans les cours de finance d'entreprise/ingénierie financière, de gestion de patrimoine ou d'immobilier (real estate). Il a pour objet de permettre aux apprenants de :

- Comprendre les différentes natures de financement participatif : Financement participatif sous forme de dons avec ou sans contrepartie, sous forme de participation en capital (equity crowdfunding), sous forme de prêt (crowdlending)
- Faire ressortir les critères de sélection applicables à un projet de promotion immobilière et juger de la qualité et des risques d'un projet spécifique
- Appréhender un montage de financement ayant recours au financement participatif sous forme d'obligations et apprécier ses risques en se référant notamment à un exemple de défaut dans un dossier récent.
- Faire une synthèse sur les risques d'un projet et prendre une décision sur l'opportunité d'y investir.

## **Synopsis**

Janvier 2017, Hubert Constantin était profondément déçu. Son compte à terme de 15.000 euros, dans lequel il avait investi 3 ans auparavant, venait à échéance et sa banque lui proposait de le renouveler à un taux de 1%, justifié par l'environnement prévalant de taux bas.

Un de ses amis lui avait vanté les rendements bruts que l'on pouvait tirer du crowdfunding immobilier : 8 à 12 %. Il parcouru différents sites de crowdfunding et un projet de promotion immobilière proche de Lorient proposé par la plateforme de financement participatif WeeXimmo lui parut particulièrement intéressant. Ayant noté, néanmoins, la faillite récente de la société de promotion Terlat qui avait eu recours à du crowdfunding, le projet et la formule d'investissement concernés étaient-ils vraiment très risqués ?

A travers ce cas ludique, fondé sur un cas réel, les étudiants pourront se mettre dans la situation d'un investisseur et :

- approfondir leurs connaissances en matière de financement participatif, de risques des projets de promotion immobilière, de ses supports de financement, de critères de sélection d'une plateforme de crowdfunding,
- décider, sur la base des caractéristiques du projet et des risques concernés, de l'opportunité ou non de faire l'investissement.

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## CASES WRITTEN IN SPANISH

Cases	Authors
Para cualquier mal... ¿Vino, Tequila o Mezcal?	Karla Liliana Haro-Zea Verónica Setene Sanchez-Aguilera
PLENUM: ¿El Detalle está en el Anaquel?	Martha Corrales-Estrada Benito Alberto Rodriguez-Rodriguez Edgar Perez Arenas
Porvenir: Rediseñando la Experiencia del Cliente vía Design Thinking	Claudia Alzate Ernesto Barrera
Logrando un sueño en el agro	Jeannette Herz
Ciudad Colonial de Santo Domingo: En la búsqueda de valor sostenible	Tania Ramirez Carlos Marti
El nuevo distribuidor para GCC	Ciro Gomez Charles Muller Sanchez
ISA y la decisión estratégica de InterNexa	Ignacio Osuna Cindy Pinzón
Interacpedia: Cambiando el modelo educativo del mundo	Jorge Gonzalez Coatlicue Regalado
EMPLAC y el lanzamiento de un nuevo yogurt en Cuba	Norma Raquel Estévez González Guberto Cánovas Riverón Josep M. Sayeras Pedro Aznar

# Para Cualquier Mal... ¿Vino, Tequila O Mezcal?

Karla Liliana Haro-Zea, Benemérita Universidad Autónoma de Puebla  
Verónica Selene Sánchez-Aguilera, Benemérita Universidad Autónoma de Puebla

## Case Objectives and Use

- Presentar un análisis de las alternativas que tiene el Director de Ansar para realizar una alianza con un fabricante de vino mexicano, de tequila o mezcal.
- Definir cuál sería la mejor alternativa de Ansar respecto a lograr una alianza estratégica con un fabricante y presentar su justificación.
- Analizar las condiciones de la industria mediante el modelo de las 5 fuerzas de Porter, para conocer las condiciones del mercado actual.

Cabe mencionar el caso ha sido adaptado para nivel licenciatura.

### Temas Académicos

Es importante aclarar que para realizar el análisis y generar discusión a partir de las preguntas detonantes y presentar una propuesta, se recomienda trabajar el caso en tres sesiones.

Este caso se sugiere trabajarlo de la siguiente manera:

Programa	Nivel	Asignatura	Temas	Competencia	Ejes Transversales
Negocios Internacionales Mercadotecnia Administración de Empresas Contaduría Pública	Licenciatura	Mercadotecnia	Análisis de mercado. Segmentación de mercado. Estrategias de mercado.	Analiza y aplica conceptos fundamentales de la mercadotecnia y los factores interactuantes del ambiente interno y externo de la empresa en un contexto globalizado para diseñar estrategias que incidan en la toma de decisiones de la gerencia de marketing.	Investigación. Desarrollo de Habilidades del Pensamiento Complejo

Fuente: elaboración propia.

## Synopsis

Durante los 90's Ansar realizó una alianza con "Tequila los Azulejos" y Tequila "Don Porfirio" sumando experiencia en la elaboración de botellas de Ron de colección y pedidos especiales por parte de amigos que buscaban envasar vino. Como todas las experiencias nuevas, estas tuvieron varios obstáculos que vencer y la necesidad de implementar formas creativas de solución de problemas y aunque la fabricación de botellas de Talavera ha sido una constante en la empresa, no así el envasado de vino en este tipo de botellas, sin embargo en diciembre de 2016, Ansar recibe nuevamente una propuesta para envasar vino en botellas de Talavera para regalos de navidad y surge en Armando Sánchez Merchant la inquietud de aprovechar la experiencia pasada de realizar una alianza estratégica con un fabricante de vinos, pero analizando sus alternativas se encuentra en la disyuntiva de buscar una alianza estratégica con un fabricante de vinos mexicanos, tequila o mezcal ¿Cuál será la su mejor alternativa?

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# PLENUM: ¿El Detalle Está En El Anaquel?

Martha Corrales-Estrada, EGADE Business School, Tecnológico de Monterrey  
Benito Alberto Rodríguez-Rodríguez, EGADE Business School, Tecnológico de Monterrey  
Edgar Pérez Arenas

## Case Objectives and Use

El caso PLENUM: ¿El detalle está en el anaquel? Fue diseñado para ser utilizado en cursos de posgrado en negocios (MBA y programas ejecutivos) relacionados con Innovación Empresarial; Operaciones y Estrategia (cadena de suministro, calidad y productividad, administración de personal); Administración de Servicios; e Innovación y Emprendimiento

Los objetivos del caso son:

- Entender la importancia de las fuerzas de cambio para la innovación, tales como la tecnología, las regulaciones, la estandarización y modularización de procesos, la liberalización de los mercados y la globalización.
- Aprender cómo los modelos de negocio innovadores y sostenibles deben ser diseñados e implementados, a partir de una propuesta de valor centrada en el cliente, entendiendo las ventajas de utilizar herramientas como el CANVAS (Osterwalder and Pigneur, 2010).
- Identificar las rutas de innovación para evolucionar el modelo de negocios (producto, servicio, modelo de negocios, canales, marca, etc).
- Entender los retos y oportunidades del emprendimiento y la innovación en mercados emergentes y en industrias como el retail, y como la tecnología puede apalancar las propuestas de valor para retailers y consumidores.

## Synopsis

Este caso analiza el dinamismo organizacional y el sentido de innovación de PLENUM en México y Perú, donde a pesar de trabajar para la misma industria, tuvieron retos diferentes para desarrollar y evolucionar su modelo de negocio e ingreso, así como su solución tecnológica, ante fuerzas de cambio como la globalización, las tecnologías y los comportamientos del consumidor y de los retailers en distintos mercados como México y Perú.

Después de analizar los diferentes acuerdos y modelos de ingreso en México y Perú, los alumnos podrán preguntarse los retos y oportunidades que enfrenta la empresa al operar en otro país. Así como también preguntarse ¿qué pasaría con la empresa si decidiera replicar su propuesta de valor en otros mercados de América Latina?

En el 2004 nace ECITON, empresa dedicada a dar soluciones en tiempo real a ciertas industrias sobre los indicadores clave para el cumplimiento de sus metas.

En el 2014 descubren un modelo de negocio rentable en la industria del *retail*, ellos deseaban entregar una solución ante el gran problema de toda la industria; el no tener anaqueles vacíos, y no se limitaron sólo a eso, les ofrecieron información para sugerirle a la tienda cuando hay que resurtir qué tipo de producto y dónde debería de ser colocado el producto, ya que descubrieron que existía una cultura muy arraigada en las tiendas de ver el espacio vacío, retirar la etiqueta y colocar cualquier producto para que no se detectara a simple vista el espacio vacío, ya que consideraba que era mejor que el cliente percibiera anaqueles llenos que espacios vacíos por rellenar con producto.

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# Porvenir: Rediseñando la experiencia del cliente vía Design Thinking

Claudia Alzate,  
Ernesto Barrera,

## Case Objectives and Use

### Synopsis

Porvenir, fondo de pensiones y cesantías líder del mercado, con 11 millones de clientes que atender, de manera estratégica ha venido preparándose para los retos de negocio y de la industria, particularmente los asociados a las economías de escala, de *desacumulación* de clientes, de educación financiera, de *engagement* (compromiso) con sus clientes, los regulatorios y de competencia asimétrica con la entidad estatal Colpensiones.

Es importante considerar el entorno y la industria, pues nos encontramos ante un producto intangible, complejo, indiferenciado (*commodity*), altamente regulado, marcado por una comunicación al cliente con un lenguaje técnico-jurídico, con lo cual, el interés en la categoría era “binario negativo”.

Los retos asociados a la eficacia y algunos de eficiencia, han venido abordándose mediante metodologías que permiten alcanzar resultados “disruptivos”, como *Lean Management* y conceptos como *producto mínimo viable*. Ahora bien, los asociados a la eficiencia y la consistencia, tenían como metodología bandera *Design Thinking*, metodología que se comenzó a incorporar desde finales del 2015. Estas metodologías se han convertido en la forma en la que se hacen las cosas en Porvenir, y hacen parte de la cultura organizacional, definida bajo el acrónimo VITAL: Vocación de servicio, Integridad, Trabajo en equipo, Apertura al cambio y Logro.

En el 2017 inicia la estrategia de *transformación digital* con proyectos que automatizan los procesos operativos de punta a punta, incorporan conceptos como *big data*, *analytics*, *agile* y *marketing digital* y tienen el diseño de experiencias de cliente como fundamental, dado que es muy fácil caer en la trampa de diseñar una transacción en el canal digital respondiendo a las necesidades de la operación y no a la experiencia que el cliente debe vivir y valorar.

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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 2018 Conference, Orlando, FL, and October 4-6, 2018. © 2018 by Ernesto Barrera. Contact person: Ernesto Barrera,

# **Logrando un Sueño en El Agro**

Jeannette M. Herz, Universidad Peruana de Ciencias Aplicadas

## **Case Objectives and Use**

Este caso se ha diseñado para alumnos de pregrado de las carreras de negocios. Es idóneo para cursos que incluyan contabilidad, finanzas y estrategia comercial. Los objetivos son:

1. Identificar los elementos que deben considerar los estados financieros: ingresos, gastos, activos, pasivos y patrimonio.
2. Aplicar técnicas de análisis y proyección de estados financieros.
3. Analizar las posibles alternativas de financiamiento para resolver el problema de liquidez.
4. Proponer alternativas de producción basándose en las posibilidades del cultivo que generen valor agregado.

## **Synopsis**

Mike Arce es el dueño de un fundo de 30 has en una zona agrícola en la costa norte de Lima, Perú. Debe buscar una solución al problema de liquidez que se le presentó a fines de 2016 y revisar si ha estado contando con la información adecuada para tomar sus decisiones. Los estudiantes son desafiados a revisar la información desde el contexto contable, financiero y comercial. En la resolución del caso, se debe revisar las NIIFS referente a ingresos que deben reportar los estados financieros, separación de los segmentos del negocio, se presta para realizar análisis y proyección de estados financieros y para buscar alternativas diferentes de producción.

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# **Ciudad Colonial de Santo Domingo: En La Búsqueda de Valor Sostenible.**

Tania Ramirez, Barna Management School  
Carlos Martí, Barna Management School

## **Case Objectives and Use**

El caso está especialmente concebido para programas de directivos del sector público con responsabilidades de gobierno y gestión; aunque también resulta útil para empresarios y directivos del sector privado que deben articular iniciativas con el sector público, o tengan incidencia en toma de decisiones con impacto en políticas públicas. Los temas que permite abordar el caso son: Liderazgo de instituciones públicas, diferencias entre gobierno y gestión pública, mapa de grupos de interés, negociación y relación entre organismos públicos y empresa privada, y modelos de gestión y desarrollo de centros históricos.

## **Synopsis**

El caso expone las dificultades que experimentan las instituciones y actores a la hora de articular un modelo de gobierno y gestión para el centro histórico de la capital de República Dominicana, más conocido como la Ciudad Colonial de Santo Domingo. La complejidad de la situación permite a los participantes descubrir la importancia de analizar y comprender a cada uno de los actores de los grupos de interés que sostienen diferentes perspectivas, roles, competencias e intereses sobre un mismo territorio.

Se describen las dudas de un empresario en julio de 2017 sobre la sostenibilidad de su inversión al comprobar la descoordinación y falta de entendimiento entre las instituciones públicas y grupos de interés de la Ciudad Colonial. La situación se agravó con la incursión del Ministerio de Turismo con el *Programa de Fomento al Turismo*, una iniciativa del Banco Interamericano de Desarrollo cuyo objetivo principal fue consolidar al país como una potencia turística en la región, a través de un contrato de préstamo por un monto de US\$31.5 millones en su primera fase y US\$91 millones para la segunda fase. Esta última sigue pendiente de asignación y aprobación, precisamente como consecuencia de los problemas descritos en el caso, y no resueltos hasta la fecha (junio 2018)

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# El nuevo distribuidor para GCC

Ciro Alberto Gomez Ardila, PhD, Inalde Business School Universidad de la Sabana  
Charles Alberto Muller Sanchez, MBA, Inalde Business School Universidad de la Sabana

## Case Objectives and Use

- Introducir el concepto de toma de decisiones multi-criterios.
- Contrastar las dificultades y metodologías de toma de decisiones multi-criterios con decisiones de un solo criterio.
- Conocer la metodología sencilla de ponderación con una función de puntuación aditiva lineal para la toma de decisiones.
- Aprender a cuantificar estamentos de preferencia implícitos y explícitos, incluyendo *trade offs* para facilitar la toma de decisiones.

El caso se diseñó como un caso introductorio para la asignatura de Análisis de Decisiones de programas de Executive MBA, luego de haber visto conceptos básicos de toma de decisiones con un solo criterio. En general el presente documento puede ser de interés para una gran variedad de programas que incluyan contenidos de toma de decisiones y, por lo tanto, es particularmente interesante para programas de Executive Education.

## Synopsis

El caso relata una situación real, por lo que los hechos, las circunstancias, consideraciones y en general los eventos descritos en el mismo han ocurrido en la forma descrita, sin embargo, los nombres e identificación de la organización, personas naturales y jurídicas involucradas han sido cambiados para mantener confidencialidad a petición de la organización.

El caso tiene como protagonista a Álvaro Ulloa de la Groningen Chemical Company Andina (GCC), quien se enfrenta (sorpresa o repentinamente) a la pérdida de su principal distribuidor en el país. Álvaro debe rápidamente escoger un nuevo distribuidor para no permitir que la competencia aproveche la situación, desplazando su posición en el mercado, pero se encuentra con que su equipo tiene visiones encontradas sobre los cinco distribuidores posibles dependiendo de los intereses de sus respectivas líneas dentro del negocio. Álvaro Ulloa cuenta con lineamientos de GCC para tomar una decisión, con conocimiento de los distribuidores y aunque puede tomar la decisión de forma unilateral, prefiere buscar una forma de lograr consenso con el equipo de trabajo.

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# ISA y la decisión estratégica de InterNexa

Ignacio Osuna Soto, Inalde Business School  
Cindy Pinzón Ríos, Inalde Business School

## Case Objectives and Use

Al comprender las implicaciones de una estrategia de diversificación, tanto de producto como de mercado, los estudiantes deberán analizar diversos factores para comprender la conveniencia o no de continuar la diversificación o replegar parte de esta. La decisión a tomar en el caso es compleja pues involucra la división diversificada más grande de la corporación, así como un activo estratégico para el negocio central (*core business*) y un mercado en riesgo.

Durante el análisis de la situación y decisión resultante, el estudiante deberá:

- Comprender la naturaleza del negocio principal (*core business*) y la génesis de la diversificación de la corporación.
- Revisar la estrategia de la corporación, entendiendo sus premisas básicas.
- Analizar las implicaciones estratégicas de cada alternativa en lo referente a aspectos de competitividad, económicos y de sostenibilidad de largo plazo, tanto para la corporación como para la filial.
- Explorar la transición de un enfoque estratégico de infraestructura y pocos clientes de alto valor a otro más masivo y de alguna forma integrado verticalmente hacia adelante. Este cambio de foco exige entendimiento de una nueva y más profunda combinación nuevo mercado/nuevo producto que hasta ahora ni la filial, ni la corporación han experimentado.

Este caso puede ser usado por estudiantes de MBA o Executive Education en cursos relacionados de estrategia y análisis de decisiones corporativas. Es útil específicamente para tratar estrategias de diversificación, la relación nuevo mercado/nuevo producto, valoración económica de alternativas e implicaciones en la competitividad y naturaleza del negocio.

## Synopsis

En abril de 2017, Pedro Arango, presidente de ISA, estaba revisando las opciones para InterNexa, filial de la compañía dedicada a las tecnologías de la información y telecomunicaciones (IT). El grupo empresarial que dirigía, se enfocaba principalmente al transporte de energía eléctrica (75% de los ingresos), pero también estaba diversificado en otras líneas de negocio de infraestructura y tenía presencia en 8 países de Latinoamérica. 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. El segmento Telco que atendía la empresa venía experimentando alianzas entre clientes de la empresa al compartir su infraestructura, prescindiendo así de la InterNexa como *carrier de carriers*.

Las opciones planteadas eran: (1) mantener la estrategia actual de infraestructura, (2) ampliar la oferta a clientes corporativos y OTT, o (3) vender la empresa. La primera, buscaba mantener la estrategia actual (alta inversión en infraestructura y relacionamiento con pocos clientes de alto valor), realizando algunos pequeños ajustes, con el fin de dar cumplimiento al plan de negocio planteado en el pasado. La segunda, tal vez la más riesgosa, implicaba dejar parcialmente la naturaleza de la filial para convertirse en una empresa orientada al clientes mas pequeños y numerosos, con servicios *high-end* empresariales tales como *datacenter*, servicios *cloud*, entre otros. La tercera, consistía en explorar la posibilidad de vender la empresa y aprovechar los múltiples de EBITDA que se estaban pagando en el sector en ese momento, pero entregando un activo que podría considerarse estratégico para el negocio principal de ISA.

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# Interacpedia: Cambiando El Modelo Educativo Del Mundo

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## Case Objectives and Use

Este caso propone realizar un análisis del modelo de negocio que la empresa de nombre Interacpedia, que tenía en abril de 2018, para calificar su desempeño en aras de buscar el alcance global que su mercado demandaba. Posteriormente se espera que el caso permita detectar aquellos elementos, según el modelo Canvas, en los que Santiago debería centrar su atención para implementar iniciativas clave que catapultaran a la empresa hacia el objetivo de atender al mercado mundial.

Asimismo, se propone revisar el concepto de *business platform* a la luz del modelo de Interacpedia, para que el lector se familiarice con las características de un término que engloba a las empresas que dominan los negocios en el siglo XXI.

## Synopsis

Interacpedia es una empresa colombiana fundada por Santiago Lalinde. En abril de 2018, el joven tenía una misión muy clara: transformar la forma en la que se brinda la educación en el mundo. Los años que había dedicado a los estudios, y sus encontronazos con la vida real profesional, lo llevaron a cuestionarse cómo mejorar el modelo educativo. Para lograrlo, desarrolló una plataforma digital que conectaba a la academia con organizaciones de diversa índole: privadas, gubernamentales, ONG.

Mediante el caso se describen cuáles fueron las experiencias que desencadenaron la creación de Interacpedia, en particular el posgrado que Santiago cursó en una de las mejores universidades del mundo, que fue decepcionante para él. Se dio cuenta de que los jóvenes, incluyéndose él mismo, se graduaban sin un aprendizaje que les sirviera en la vida real, que los proyectos realizados durante la carrera no tenían un uso real y que las habilidades que desarrollaban no eran las que el mundo actual laboral exigía.

Por ello dedicó su tiempo a estudiar cómo funcionaban los mejores modelos educativos del mundo, y a partir de ese análisis diseñó el modelo de Interacpedia, que permitiera a los alumnos aprender con problemas reales, participando en su resolución.

Su modelo de negocio funcionaba mediante cuotas que las empresas o instituciones públicas pagaban a Interacpedia para postular retos. Eso implicaba que cada reto fuera evaluado y pasara ciertos filtros, desarrollados por el propio Santiago y su equipo, para que los problemas a resolver realmente sirvieran de preparación para los alumnos.

Interacpedia, tal como se describía en su sitio web, era una experiencia de cocreación que incentivaba la colaboración más allá de las fronteras físicas, pues permitía participar a grupos de diferentes escuelas en diferentes partes del mundo para resolver el mismo problema.

En un corto tiempo la empresa ya tenía presencia a nivel internacional pues realizaría pilotos en varias universidades. Lo que Santiago observaba era que no podía dar respuesta a la demanda de sus servicios y buscaba cómo tener un alcance más global.

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# EMPLAC y el lanzamiento de un nuevo producto en Cuba

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Guberto Cánovas Riverón – Universidad de Camagüey “Ignacio Agramonte Loynaz”

Josep M. Sayeras, ESADE – Universitat Ramon Llull

Pedro Aznar, ESADE – Universitat Ramon Llull

## Case Objectives and Use

Los objetivos del caso pueden ser múltiples y variados atendiendo a los distintos objetivos de aprendizaje. Por ejemplo, a nivel genérico:

- Discutir la definición de “mercado” desde el punto de vista de *Managerial Economics*.
- Señalar los distintos actores que van a jugar un papel determinante en el proceso.
- Buscar las ventajas competitivas, sus fuentes, así como su posibilidad de permanencia en el tiempo.
- Analizar la evolución de una industria con una estructura de monopolio, así como sus principales características.
- Analizar la toma de decisiones no estructuradas sobre la base del análisis estratégico con múltiples variables.

El caso EMPLAC ha sido diseñado para ser utilizado en cursos de *Managerial Economics* y de Política de Empresa/Estrategia. El caso presenta la situación de la introducción de un producto en un Mercado emergente en un país con consideraciones de economía política y geopolíticas relevantes (Cuba). Esta discusión se plantea en una situación real, de una compañía real, en un mercado determinado. Permite, asimismo, discutir sobre la delimitación de un mercado y, en consecuencia, quiénes serán los agentes de mercado, sus posibles acciones-reacciones, etc.

Puede utilizarse tanto en cursos de post-grado como de pre-grado. Si se quiere utilizar en cursos avanzados, se recomienda que el principal foco la evolución del sector y de la industria y la interacción estratégica.

## Synopsis

El caso que se presenta trata sobre la introducción o no de un nuevo producto al mercado por parte de la Empresa de Productos Lácteos de Camagüey (EMPLAC). Aparecen elementos relacionados con la tipología de mercado, las ventajas competitivas de la empresa, aspectos del modelo de las cinco fuerzas competitivas de Porter; con el objetivo de poder establecer si es oportuno y conveniente para la empresa el reto de un nuevo producto. Se facilitan datos sobre la magnitud de la empresa y su importancia en el sector. En Cuba se opera con doble moneda con tipo de cambio fijo 1 cuc = 25 cup y este producto ha sido concebido para ser comercializado en cuc (moneda oficial convertible; creada por el gobierno como un equivalente del dólar americano con el fin de recaudar divisas internacionales en el mercado interno). El mercado cubano se caracteriza por dominio de empresas estatales prácticamente cuasi-monopólicas.

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# CORPORATE GOVERNANCE AND ETHICS CASES

Cases	Authors
Spot Fixing in Cricket: Amir's No-ball	Fahad Mehmood
Two wrongs. Can he make it right?	Omais Haroon
	Terry McGovern
	Charles Hilterbrand
	Janis Gogan
Hershey's Ethical Supply Chain Dilemma: Should Cocoa Growers Be Offered a Living Income?	David Wernick
Is It Wrong to Be Right? Confronting Alcoholism on The Job	Neal Lund
	Michael Breward
	Katherine Breward
No Strategy & No CEO: Is Loyocracy Sustainable?	Philippe Lamb
	Eric Rakotoasimbola
	Joana Navalho
	Divine Rubayiza
	Oussama Darouichi
	Vijaya Narapareddy

# **Spot fixing in cricket: Amir's no-ball**

Fahad Mehmood, Lahore University of Management Sciences

Omar Haroon, Lahore University of Management Sciences

## **Case Objectives and Use**

The world of cricket was shook by 'spot-fixing' allegations against three Pakistani cricket team players during one of the most important games in the cricket calendar for the nation in the summer of 2010. News of the World, a British tabloid conducted a sting operation against Pakistani players, trapping them into deliberately taking actions during a match against England which an average spectator cannot predict. The 'bookies' take bets for such events happening during a game and gamblers can make substantial sums of money if they have foreknowledge. The players were offered payments for these actions to be performed during the game, which although have little impact on the eventual outcome of the game but can entail serious monetary benefits for the bookies and their allies. The discovery of these events raised several questions regarding the governance and ethics of the sport.

This case uses open sourced data to put students in face of a huge scandal in cricket and makes them question the issues of fairness vs ethical dilemmas and whether rules should be followed completely or should the age or amazing performance of an individual should also be considered?

Learning objectives for the case are:

- A. to develop understanding of theories in ethics and their application
- B. to explore ethical decision-making problems in a complex and internationally relevant context
- C. to introduce the debate on application of rules considering context of the offence and situation of the offender.
- D. to introduce biases in management decision making
- E. to appreciate the influence of nationality, religion and race in decision making

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# **Two Wrongs. Can He Make It Right**

Terry McGovern, University of South Florida, DBA Candidate  
Charles Hilterbrand, University of South Florida, DBA Candidate  
Janis Gogan, Bentley University, Faculty Advisor

## **Case Objectives and Use**

- Employ a systematic process to assist in making ethically sound decisions.
- Understand the legalities associated with whistleblowing to include its legal definition.
- Apply fraud-detection problem-solving techniques to identify a thief
- Assess dominant philosophical theories associated with professional ethics.

Target course

This teaching note describes how to use the case in an MBA professional ethics course. The case can also support student discussion in courses on auditing, business law, forensic accounting, human resources, or organizational behavior.

## **Synopsis**

In 2016, organizations suffered a median loss of \$294K through employee embezzlement. About half of organizations victim to employee theft had fewer than 25 employees. Additionally, the I.R.S. estimates roughly \$125B of small business income goes unreported.

This case describes an ethical dilemma faced by a financial forensic auditor, Colin Doyle, a retired U.S. Treasury Department financial investigator who was running his own financial fraud business. A local, long-time, business owner, Jon Dough, hired Doyle after the business owner suspected an employee was pilfering money from his re-upholstery business. When Doyle began his investigation he quickly discovered the business owner was also committing fraud by not reporting cash income to state and federal tax agencies.

Now Doyle is faced with an ethical dilemma. Should he report the tax evasion to state and federal authorities? Is he obligated to report as a professional investigator? Is he legally bound to report since he knows of the crime? What are Doyle's obligations to his client in terms of privacy? If he does report, what will happen to his reputation and his business within the business community after he is discovered to be a whistleblower? Would he enjoy any protections of the law for whistleblowers? What about Doyle's personal values—how do they matter with respect to his decision?

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# **Hershey's Ethical Supply Chain Dilemma: Should Cocoa Growers Be Offered A Living Income?**

David Wernick, Florida International University

## **Case Objectives and Use**

This case is geared to undergraduate and first-year MBA students taking international business, international management, strategic management, business ethics, and business and society classes. It aims to provide students with an opportunity to develop guidelines for making decisions in difficult situations that are ambiguous with regard to their outcome and that have ethical and legal implications. It also provides an opportunity for students to discuss the concepts of shareholder and stakeholder value and identify the different interests and perspectives of internal and external stakeholders. Further, the case aims to explore how moral and ethical theories can be applied in a real world setting. Finally, it provides a contemporary example of the challenges faced by corporate executives in attempting to maximize shareholder value while meeting changing societal expectations.

## **Synopsis**

This describes a strategic dilemma facing Hershey Company President and CEO Michelle Buck. Set in April 2018, it begins with the CEO reflecting upon recent business developments while driving along country roads to a board meeting at the company headquarters in central Pennsylvania. On the one hand, things seem to be going well for the new boss – sales and profits are up and the global chocolate market continues to expand. Moreover, the CEO has received praise from investors for her growth strategy, focused on turning the chocolate giant into an “innovative snacking powerhouse.” Meanwhile, the company continues to be ranked among the most reputable in America. Notwithstanding these and other positive developments, there is cause for concern. Cocoa bean prices have been rising, cutting into profits, and growing numbers of American consumers are switching from milk chocolate to specialty dark chocolate products made by artisan brands and healthier snacks. But the CEO's biggest concern is the growing public outrage over the plight of cocoa growers in West Africa. Notwithstanding the company's extensive CSR initiatives, Hershey's continues to receive criticism for failing to curb child labor within its supply chain. Stakeholder groups have begun to mobilize against the company, organizing protests, boycotts, and filing class-action lawsuits. As the CEO arrives at her destination, she considers whether bolder steps are needed to safeguard the company's reputation and future revenue streams. Such steps might include switching from conventional to Fair Trade cocoa and adopting a “living income” compensation scheme for cocoa growers.

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# Is It Wrong to Be Right? Confronting Alcoholism on The Job

Neal Lund, University of Winnipeg  
Michael Breward, University of Winnipeg  
Katherine Breward, University of Winnipeg

## Case Objectives and Use

This case is primarily intended to be used in ethics courses, especially those that follow the “Giving Voice to Values” methodology. In addition it can be useful for foundational human resource management (HRM) courses when exploring substance abuse policies and disability management practices. Finally it is suitable for occupational health and safety courses taught at all levels, especially courses targeting young adults that focus on workplace safety and workers’ rights and responsibilities. Please note that not all learning objectives and discussion questions are suitable for every context, please see the “Teaching Approach” section for more information.

After analyzing this case students should be able to:

1. Conduct a thorough stakeholder analysis assessing the current and potential impact of substance abuse at work when the worker is in a safety sensitive position.
2. Analyze reasons that substance abuse often goes unaddressed at work including: a) Common rationalizations that individual stakeholders provide for not addressing substance abuse at work; and b) The role of corporate culture in shaping attitudes towards substance abuse at work.
3. Craft effective arguments for: a) Countering common rationalizations made by individual stakeholders for not addressing substance abuse at work; and b) Convincing senior level decision makers that a change to a safety oriented culture is needed.
4. Recommend disability management strategies for employees with addictions that meet appropriate legal, regulatory, and ethical standards.
5. Recommend substance abuse policies for all employees that meet appropriate legal, regulatory, and ethical standards.

## Synopsis

Leon uses his mother’s connections to obtain a new job at a printing company. Leon had a rocky start trying to learn how to operate a large industrial sized cutting machine during which his less than stellar performance resulted in him becoming criticized, ostracized, and alienated by most of his co-workers. When it seemed Leon was on the verge of being forced out by the other employees, Ralph, the main cutting machine operator who had almost three decades of experience in the industry, stepped up and reminded all the other workers of their learning curves with the various machines. This helped smooth over Leon’s relationship with the other workers and he soon became fully accepted as one of their own. However, as time went on Leon became aware that Ralph had a drinking problem and was drinking heavily while at work. While this is unacceptable behaviour in any work context, given the nature of the job Ralph was performing, there is the potential for serious injury or death. So now Leon has to decide whether or not he is going to address Ralph’s drinking problem after Ralph was the only person who stuck up for Leon when the other workers had wanted him fired; and if he Leon decides to address this issue, how should he do so?. The case gives students the opportunity to recommend a course of action for Leon based upon a detailed stakeholder analysis using the Giving Voice to Values (GVV) framework. It also allows students to examine the legislation surrounding substance abuse and addiction-based disabilities in the workplace and to develop appropriate organizational responses in dealing with these issues.

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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 2018 Conference, Orlando, FL, October 4-6, 2018. © 2018 by Neal Lund, Michael Breward, and Katherine Breward. Contact person: Michael Breward, University of Winnipeg, Winnipeg, MB. m.beward@uwinnipeg.ca.

# **No Strategy & No Ceo: Is Loycocracy Sustainable?**

Philippe Lamb, Eric Rakotoasimbola, Joana Navalho, Divine Rubayiza, and Oussama Darouichi,  
University of Neuchâtel, Switzerland  
Vijaya Narapareddy, University of Denver, USA

## **Case Objectives and Use**

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

- Social Entrepreneurship;
- Strategy; and
- Sustainability.

It deals with the following issues:

- Triple Bottom Line Businesses
- B-Corporations
- Teal Organizations
- Holacracy
- Self-governance and Sustainability

## **Synopsis**

This case discusses the founding of Loyco in Geneva, Switzerland in 2013 by progressive-minded businessmen who gave up lucrative careers to launch a B2B human-centric business. Loyco offered insurance, human resource, accounting, and risk management services using online management tools. The case describes how the 31-year old co-founder/CEO, Christophe Barman developed the company to become a B-Corporation with a set of core values that formed the bedrock of Loyco's strategy and sought growth by embracing the triple bottom-line approach. Barman's vision and dedication to the vision paid off when, in 2016, Loyco was awarded "best for the world" in the People category by the international organization of B-Corporations and was also recognized as the second-best employer in the French part of Switzerland by the magazine "Le Bilan".

One aspect that Barman was passionate about was Loycocracy. Loycocracy meant removing organizational hierarchy and empowering all employees to make the necessary decisions to manage the organization without seeking approval from anyone in the organization. What Barman envisioned was a self-governing organization without leaders at the top and no CEO to make organizational decisions. Hence, it was no surprise that as of April 2018, CEO Barman had no growth strategy in place and was also set to leave his leadership position in May 2018. Students have the opportunity to address whether Loyco would continue to sustainable without a CEO as well as no growth strategy.

This case can be taught in traditional face-to-face, online, and hybrid courses.

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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 were anonymously peer reviewed for presentation at the NACRA 2018 Conference, Orlando, FL, October 4-6, 2018. © 2018 by Lamb, Rakotoasimbola, Navalho, Rubayiza, Darouichi, and Narapareddy. Contact persons: Philippe Lamb, University of Neuchâtel, Neuchâtel, NP 2000 (e-mail: [philippe.lamb@unine.ch](mailto:philippe.lamb@unine.ch)) and Vijaya Narapareddy, University of Denver, Denver, CO 80210 (e-mail: [vnarapareddy@gmail.com](mailto:vnarapareddy@gmail.com)).

# ENTREPRENEURSHIP, FAMILY, AND SMALL BUSINESS CASES

Cases	Authors
The Case of the Misfit Manager: Brantham's English Pub	Susan Peters Melissa Mann
Canna Maestro: Leveraging an Underperforming Dispensary	Valery Vue
'Raj Electronics' - Transition to Online	Punyaslok Dhall
Selectronic: Facing Disruption Due to Artificial Intelligence	Jaydeep Mukherjee Veeresh Sharma
Rooh Afza – Tumbling Forward with Heritage	Jami Moiz Nida Khan
Keweenaw Mountain Lodge: An Opportunity Worth Pursuing?	Lisa Eshbach Nancy M. Levenburg
Yerdle: Scaling Up in the Sharing Economy	Elizabeth Arredondo Chi Ngo Alison Thoma David Hyatt
Invisawear Part I: Evolving the Entrepreneurial Mindset	Roberto S. Santos
Invisawear Part II: Bridges Under Construction	Xiaoyi Luo
Invisawear Part III: Building Traction with Crowdfunding	Sunny Li Sun
Expand.it: Organic vs. Partnership Growth Dilemma	Jan Rehak Rene Cossio
Gunnels and Son	Christopher M. Cassidy
Sharing Academy: Introducing Peer-Tutoring in Spanish Universities	Paul Fox Josep Lluís Cano Giner
Bake Parlor Goes Italian – Boosting the Pasta Category in Pakistan	Nida Khan Jami Moiz

# **The Case of The Misfit Manager: Brantham's English Pub**

Susan Peters, University of North Carolina at Pembroke  
Melissa Mann, University of North Carolina at Pembroke

## **Case Objectives and Use**

This course is suitable for an Entrepreneurship class discussing first hires and other human resources issues. It could also be used in a human resources class. This case is lightly disguised and a shorter version has been used in a class setting.

The case objectives:

- Illustrate employment selection processes in small businesses and the impact they can have on the business.
- Explain the importance of having a good job description and using it throughout the hiring process.
- Explain the risks to small business managers from failure to establish policies and procedures with appropriate controls.
- Recognize, understand and analyze a variety of human resources issues and problems in a small business.
- Analyze the issues involved in professionalizing a family run business

## **Synopsis**

An expansion to Ian Brantham's "Brantham's English Pub" triggered the first non-family member hire in the firm's fifteen-year existence. Like many entrepreneurs, Brantham did not have a well-developed hiring process and took some shortcuts. Linda appeared like a great candidate, but from the start Brantham realized that he and she had different ideas about how the business should be conducted. He realized, also, that it might be hard for him to trust a non-family member. The business was running well, but Linda did things he wasn't sure he liked. And then the rumors started.

This course is suitable for an Entrepreneurship class discussing first hires and other human resources issues. It could also be used in a human resources class. This case is lightly disguised and has been used in a class setting.

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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. 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 6-6, 2004, Orlando, FL. All rights are reserved to the authors and NACRA. © 2018 by Susan Peters and Melissa Mann. Contact person: Susan Peters, University of North Carolina at Pembroke, Pembroke, NC, [susan.peters@uncp.edu](mailto:susan.peters@uncp.edu)

# **Canna Maestro: Leveraging an Underperforming Dispensary**

Valery Vue, Sonoma State University

## **Case Objectives and Use**

This case can be used for a classroom discussion, group project, or individual assignments in a strategic management or graduate core course. Canna Maestro: How to Leverage an Underperforming Dispensary focuses on how Canna Maestro can leverage its Green Pharms division to achieve its growth strategy. The case should be used towards the end of a course when students have developed an understanding of strategy formulation and implementation and the utility of various strategic analysis tools (i.e., VRIO, PESTEL, SWOT, Porter's Five Forces, etc.) in the evaluation process.

Students will learn how to:

1. Evaluate strategic management approaches in relation to existing resources and capabilities for a competitive advantage.
2. Use strategic analysis frameworks (i.e., VRIO, Porter's Five Forces, SWOT, PESTEL, etc.) to interpret competitive advantage and opportunities.
3. Analyze historical performance and financial projections using financial ratios.
4. Recommend the most viable path forward based on strategic evaluations.

## **Synopsis**

January 1, 2018 was the first day recreational cannabis was legal for sale in California. Sonoma County's largest medicinal marijuana seed-to-shelf producer and distributor Canna Maestro saw immense opportunities with this new adult-use market. Bob Stephen, a former educator, author, and business thought leader, learned that Canna Maestro was facing a fierce Oregon-based competitor, CuraCanna Solutions, that owned double Canna Maestro's market share. Stephen needed to position the company to regain market share and be the leading manufacturer and distributor in California. Stephens brought strategy, leadership, and execution skills, and the deep network that Canna Maestro needed. Unlike CuraCanna Solutions, Canna Maestro had its own dispensary division, the solar-powered Green Pharms located in Mendocino County.

Stephen considered how the dispensary could be leveraged to help Canna Maestro with its larger goals. Green Pharms grossed \$3.2 million in 2017 sales, a 62.7% CAGR from 2016, but had negative net profit for the past two years. Stephens contemplated whether to keep the status quo, close it down, relocate, add features, or add more locations.

The case includes information on the California and U.S. cannabis industry; regional and statewide competition; and financial and demographic forecasts through 2020.

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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 2018 Conference, Orlando, FL, October 4-6, 2018. © 2018 by Valery Vue. Contact person: Valery Vue, Sonoma State University - School of Business and Economics, 1801 East Cotati Avenue Rohnert Park California 94928, United States, T: 5303545681, [vue@sonoma.edu](mailto:vue@sonoma.edu)

# **‘Raj Electronics’ – Transition to Online**

Punyaslok Dhall, Xavier Institute of Management

## **Case Objectives and Use**

The case should ideally be discussed in an advanced second year MBA course or towards the end of first year course where students are already exposed to basic marketing principles. The case works well in courses on strategic marketing or entrepreneurship. It also works well with executives specializing in marketing. The objectives are:

- Familiarize the students with the latest online trends in consumer durables in India and the future of doing business in consumer durable retailing.
- Recognize the situations that necessitate reorienting the business model in case of small traditional family business.
- Explore strategic and operational approaches managers can adopt to evaluate the terms of relationship from huge online organization supported by venture capitalist with deep pockets.

## **Synopsis**

This disguised case based on the actual events happened in May, 2018, describes a situation facing the protagonist Sidharth, at Raj Electronics. Raj Electronics is a multi-brand consumer durable retail chain operating for last 30 years. Sidharth a tech-savvy engineer recently inducted to the family business has to take a decision whether or not to partner an online B2C major to boost the future sales.

Sidharth after familiarizing himself in the business had to study the online scenario in consumer durable and the internal capabilities of Raj Electronics. The first issue was whether to build the robust online model in-house or to have a tie up. The second major concern was how to evaluate the terms and conditions of the online giant and whether it is worth going for the relationship at the cost of financial strain or to remain in the current form. Based on the business trends Sidharth was tempted to go for the online partnership, but later discovered that there are so many other unfavorable factors and a much deeper analysis needed for the final decision. As the case closes, Sidharth has to decide whether to have strategic tie up with Flipkart for an exponential growth in turnover at the cost of operating profit.

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# Selectronic: Facing Disruption Due to Artificial Intelligence

Jaydeep Mukherjee, Professor, Management Development Institute, Gurgaon, India

Veeresh Sharma, Professor, Management Development Institute, Gurgaon, India

## Case objective and use

The following could be discussed and debated using the case, helping in developing understanding about the following:-

1. How entrepreneurs can assess the threat of disruptive impact of new technologies on their business.
2. How entrepreneurs can assess new business opportunities and compare competing options.
3. How to develop new business model plans.

## Synopsis

Veer Sagar, CEO of Selectronic India, was extremely satisfied with the results of the company in financial year 2017-18. However, evolving technologies made him seriously worried about the future prospects of the value proposition to his clients, and the core competency of the company. Artificial Intelligence could do all the work that Selectronic was doing, at lesser cost and with greater accuracy. In such a changed scenario, advantage of small organization, lower cost base, and empowered employees was unlikely to help Selectronic business anymore. He had been actively exploring the idea of entering the outsourced security monitoring opportunity in US or remote coaching of cricket in India, both of which also had global potential in future. Harnessing these options required entirely different business models, core competences and quantum of investments which were very different from Selectronic. The threat of losing the medical records review business to AI based solutions in near future was very real and Veer had to make his choice soon.

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# **Rooh Afza – Tumbling Forward with Heritage**

Nida Aslam Khan, Institute of Business Administration, Karachi, Pakistan

Jami Moiz, Institute of Business Administration, Karachi, Pakistan

## **Case Objectives and Use**

The case can be used in a faculty seminar (such as a seminar on rebranding processes or on teaching by the case method), for an undergraduate class in marketing , or graduate classes for understanding the development and incorporation of brand identity models for rebranding purposes. The objectives are:

1. Review the brand identity model presented by (Kapferer, 2008), and understand thoroughly the different composites of brand identity
2. Introduce and analyze the rebranding process developed by (Muzellec & Lambkin, 2006)
3. Explore different approaches that brand managers take for purposes of rebranding – while trying to shield the rband equity from the new face of the brand

## **Synopsis**

The case is based on actual events faced by newly appointed brand manager for Rooh Afza, Usama Qureshi during 2017. Qureshi has taken on the daunting task and challenge of repositioning and reimagining the brand in Pakistan. This revamp of the brand is needed in the face of changing consumer behavior and habits, as well as changing trends in the beverage industry. Unfortunately, Rooh Afza has always been seen a heritage brand that has fallen victim to its own heritage. Qureshi must now decide on how to rejuvenate the brand so it is able to better connect with the youth, while not losing out on its current consumers – and also on how to make it a drink or all seasons.

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# **Keweenaw Mountain Lodge: An Opportunity with Pursuing?**

Lisa Eshbach, Ferris State University  
Nancy M. Levenburg, Grand Valley State University

## **Case Objectives and Use**

The case is designed to be used in a course in which students focus on business acquisition by means of purchase and small business management. It would be useful in a graduate-level or upper-level undergraduate entrepreneurship, small business management, or hospitality/tourism course.

Specific case objectives include:

- Apply the concepts of entrepreneurial orientation to evaluate the potential for a successful new business venture.
- Analyze a seasonal business and determine the company's strengths and weaknesses by interpreting financial statements and preparing a breakeven analysis.
- Evaluate how the firm's history, established market, features, location, and legal requirements may influence the analysis, and thus the worth of the business.
- Determine the value of the business, and make a recommendation on how the prospective owners should proceed.

## **Synopsis**

Anna and Jack Oleson, long-time owners of a bridal and formal wear shop in a small community in Michigan's Upper Peninsula (U.P.), are contemplating making an offer to buy the Keweenaw Mountain Lodge (KML) property, located in Copper Harbor on the Keweenaw Peninsula. The property has been owned and operated by Keweenaw County since 1933. Situated on 167 heavily-wooded acres, the facility includes a 6,000 square foot lodge built from logs and rough-cut stone, a banquet room and conference center, 24 rustic cabins, an eight-room motel, a nine-hole golf course, mountain biking and hiking trails, a tennis court, and disc golf. In 1970, the lodge was listed on the National Register of Historic Places, and in 1976, it was designated as a Michigan State Historic Site.

The asking price for the property is \$1.5 million. While the facility has been a family vacation destination and used to host wedding receptions, it has not produced profits in several years. Consultants have noted the need for repairs, renovation and updating of facilities.

The case provides a general overview of Michigan's Upper Peninsula and its unique culture, and the considerations involved in making a purchase decision – i.e., marketing, location and local demographics, operations and management, succession planning, and financial valuation.

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# **Yerdle: Scaling Up in The Sharing Economy**

Elizabeth Arredondo, Chi Ngo, Alison  
Thoma, and David G Hyatt  
University of Arkansas

## **Case Objectives and Use**

This case is well suited for courses in business strategy, social enterprise, entrepreneurship, or business and sustainability. The case is particularly well-suited for a course in entrepreneurship or social entrepreneurship, during a segment of the course where attributes of successful entrepreneurs are covered (or effectuation in simple start-ups, or even entrepreneurial orientation in “high-tech” innovators).

After working this case, students should be able to:

1. Describe the issues that Andy Ruben and Yerdle faced with regards to the best path forward for scaling up in the sharing economy.
2. Evaluate the opportunities and risks associated with both options for Yerdle (staying in the current platform, or moving to brand-based sharing).
3. Recommend a path forward for Ruben and Yerdle, including solid reasoning behind it.
4. Recognize and discuss advantages of corporate organizational flexibility, especially in entrepreneurship.
5. Recognize the positives and negatives of risk in an organization, including how to best manage risk in a leadership role.

## **Synopsis**

This case centers on the co-founder of Yerdle, Andy Ruben, as he determines the future direction of Yerdle. In 2012, Ruben, along with Adam Werbach and Carl Tashian, founded Yerdle to help address an issue they saw involving human overconsumption. They wanted to make sharing and reusing goods a viable option alongside purchasing new items. Their ultimate goal was to make the idea of “reuse” as easy as online shopping. Using a peer-to-peer model, by 2013 Yerdle had rehomed about 1,000 used items a month after its first year of operations. Ruben and the Yerdle team dealt with continuous challenges encountered at different scale. But at around one million users on their sharing platform, Ruben began to realize the limitations of the peer-to-peer structure: friction (parts of the system that impede smooth transactions), user acquisition and unit economics. These limitations forced Ruben to consider what direction was right for Yerdle. Should he keep Yerdle’s peer-to-peer platform? Or should he close the platform, losing a membership base of over 1 million users and almost \$18 million of funding, to start from scratch with brand partnerships?

This case was written to teach the importance of flexibility, especially in entrepreneurship. It also has a lesson in risk management for organizations. The case describes how Yerdle has been operating and developing up to 2016, and it then sets up the problem of where to go from here in order to maximize impact. It asks students to propose and evaluate options for Yerdle to address the underlying issues with the peer-to-peer structure, eventually choosing a best course forward for Yerdle. It teaches flexibility by encouraging students to consider the challenges of completely changing course in a start-up, and when and why that would be a good decision, including how to maximize results and minimize the risk involved.

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# **Invisawear Part I: Evolving the Entrepreneurial Mindset**

Roberto S. Santos, University of Massachusetts Lowell

Xiaoyi Luo, Nankai University

Sunny Li Sun, University of Massachusetts Lowell

## **Case Objectives and Use**

This case is suitable for both an advanced undergraduate course in technology-oriented entrepreneurship or an MBA course. This case is intended to help both business and non-business students understand the importance of innovation and entrepreneurship. Presented as a real-life example of how students can make the transition from an engineering mindset to an entrepreneurial mindset, the case can also be used to hone in on select topics including: entrepreneurial characteristics, ideation, taking risks, social entrepreneurship, and the business model canvas. This case study is intended to not only cultivate an entrepreneurial mindset among students, but also instill a deeper appreciation for entrepreneurship.

Used as a teaching instrument for a technology-oriented entrepreneurship course, the case highlights the motivations that drive entrepreneurs to start a business, shows that entrepreneurs come from many different backgrounds, and illustrates how an entrepreneurial mindset can be learned. The objectives are:

- Understand the similarities and differences between the engineering and entrepreneurial mindset.
- Learn about how university-based entrepreneurship programs facilitate student entrepreneurship.
- Learn about the important role that mentors play in facilitating the development of an entrepreneurial mindset among young entrepreneurs.
- Explore how founders can leverage the dual identities of being both an engineer and an entrepreneur to build a successful venture.

## **Synopsis**

Founded in 2016, invisawear is a personal safety device company that seamlessly blends high-fashion and high-tech. The line of smart jewelry instantly sends your location to emergency dispatchers and loved ones during an emergency. Conceived by two UMass Lowell engineering students, Rajia Abdelaziz and Raymond Hamilton, who saw a need for something better than pepper spray and bulky panic buttons, invisawear allows users to instantly contact police with a simple click of a button. This not only provides peace of mind, but also empowers users to feel safe, secure, and connected. But it's one thing to have a great idea and quite another to turn that idea into a real business. What do engineers know about business anyway? Although engineers and business people may think differently, these two disciplines are quite complementary. This is something that Rajia and Ray would learn as we follow their journey and learn how they made the transition and evolved an entrepreneurial mindset.

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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 2018 Conference, Orlando, FL, October 4-6, 2018. © 2018 by Roberto S. Santos, Xiaoyi Luo and Sunny Li Sun. Contact person: Roberto Santos, University of Massachusetts Lowell, Pulichino-Tong Business Center, 72 University Avenue, Lowell, MA 01854, Roberto\_Santos@student.uml.edu.

# **Invisawear Part II: Bridges Under Construction**

Roberto S. Santos, University of Massachusetts Lowell

Xiaoyi Luo, Nankai University

Sunny Li Sun, University of Massachusetts Lowell

## **Case Objectives and Use**

This case is suitable for both an advanced undergraduate course in technology-oriented entrepreneurship or an MBA course. This case is intended to help both business and non-business students understand the importance of innovation and entrepreneurship. Presented as a real-life example of how entrepreneurs build their networks, the case can also be used to hone in on select topics including: the importance of multipliers, mentoring, search for resources and coachability. This case study is intended to not only demonstrate how entrepreneurs build and use their networks to establish their businesses, but also instill a deeper appreciation for entrepreneurship.

Used as a teaching instrument for a technology-oriented entrepreneurship, the case highlights the importance of building a network, describes how entrepreneurs go about building a network, and articulates the qualities that entrepreneurs should possess to be successful at networking. The objectives are:

- Learn about multipliers and why they are important for entrepreneurs.
- Learn how affiliations provide credibility and why it is important for start-ups to build credibility.
- Understand the differences between strong ties and weak ties.
- Explore the qualities that successful entrepreneurs possess (such as self-monitoring and coachability) and how these qualities can influence relationships with mentors and investors.

## **Synopsis**

Founded in 2016, invisawear is a personal safety device company that seamlessly blends high-fashion and high-tech. The line of smart jewelry instantly sends your location to emergency dispatchers and loved ones during an emergency. Conceived by two UMass Lowell engineering students, Rajia Abdelaziz and Raymond Hamilton, who saw a need for something better than pepper spray and bulky panic buttons, invisawear allows users to instantly contact police with a simple click of a button. This not only provides peace of mind, but also empowers users to feel safe, secure, and connected. But it's one thing to have a great idea and quite another to turn that idea into a real business. Few entrepreneurs can say that they didn't need help along the way to get their business off the ground. Whether it is knowledge, expertise, or resources (such as capital), entrepreneurs rely on many other people (family, friends, friends of friends, acquaintances, etc.) as a source for assistance. Networking is a process that is useful for building relationships with others who may be in a position to help you either today or in the future. This is something that Rajia and Ray would learn as we follow their journey and explore how they built a network that allowed them to build invisawear from an idea into a business.

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# **Invisawear Part III: Building Traction with Crowdfunding**

Roberto S. Santos, University of Massachusetts Lowell

Xiaoyi Luo, Nankai University

Sunny Li Sun, University of Massachusetts Lowell

## **Case Objectives and Use**

This case is suitable for both an advanced undergraduate course in technology-oriented entrepreneurship or an MBA course. This case is intended to help both business and non-business students understand the importance of innovation and entrepreneurship. Presented as a real-life example of how start-up companies can use crowdfunding to get customers, raise funding and demonstrate traction to future investors, the case can also be used to hone in on select topics including: the importance of storytelling, social entrepreneurship, social media and analytics. The case study is intended to not only demonstrate how entrepreneurs can find creative solutions to the “chicken and the egg” dilemma of entrepreneurial financing, but also instill a deeper appreciation for entrepreneurship.

Used as a teaching instrument for a technology-oriented entrepreneurship course, the case highlights how crowdfunding can be used to overcome the “chicken and the egg” dilemma, articulates the essentials of crafting a successful campaign, and stresses the importance of storytelling. The objectives are:

- Understand what the “chicken and the egg” dilemma is and how it can be overcome.
- Explore the elements that make for a successful crowdfunding campaign.
- Learn about the importance of storytelling in business along with the three elements of a compelling story.
- Learn how entrepreneurs can use business analytics to enhance storytelling.

## **Synopsis**

Founded in 2016, invisawear is a personal safety device company that seamlessly blends high-fashion and high-tech. The line of smart jewelry instantly sends your location to emergency dispatchers and loved ones during an emergency. Conceived by two UMass Lowell engineering students, Rajia Abdelaziz and Raymond Hamilton, who saw a need for something better than pepper spray and bulky panic buttons, invisawear allows users to instantly contact police with a simple click of a button. This not only provides peace of mind, but also empowers users to feel safe, secure, and connected. But having a great idea isn't enough, you need to be able to bring that idea to market and you need customers. After all, the ultimate validation of all your hard work is whether anyone is willing to pay money to buy your product. But you need money to get the customers and investors aren't willing to give you the money unless you already have sales and can demonstrate traction. This is the “chicken and the egg” dilemma that Rajia and Ray found themselves facing. So how did they kill two birds with one stone? They turned to crowdfunding. We follow Rajia and Ray's journey as they learn how to use crowdfunding to get customers, raise funding and demonstrate that their start-up company was gaining traction.

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# Expand.It: Organic Vs. Partnership Growth Dilemma

Jan Rehak, Tec de Monterrey  
Rene Cossio, Tec de Monterrey

## Case Objectives

The primary teaching objective of the case is to provide students the understanding of the following:

- The dynamics and importance of managerial decision-making process in the startup business. The student needs to be able to analytically evaluate the added value of strategic options of the company, and understand how to use his knowledge to do so. How to use analysis and due diligence in case of a non-financial investment.
- Management challenges of a scaling startup organization, and confronting the issues that the growth brings. This includes the understanding how to develop functioning structure of the organization, well defined processes.

## Synopsis

Expand.it is a digital marketing startup located in Queretaro City in Mexico, founded by Rene A. Cossio in 2015. The company went over a number of re-brandings and business model iterations over the next two years, growing in sales and size. The important milestones in the development of the company that should be mentioned are the following: Start as a crowdspeaking platform Crowdie (December 2015); Invitation to Campus Party Mexico as one of the 100 innovative tech startups in Mexico (May - June 2016); Iteration from crowdspeaking to digital marketing (August 2016); Rebranding to Expand It Now (September 2016); Entrance of Jorge Magnus as operations director and shareholder (April 2017); Acquiring of big clients and start of exponential growth (May – June 2017); Strategy of Think-Create-Reach is established (October 2017); Offer from Management & Research (November 2017). Company due to its growth in 2017, faced a number of issues with organizational processes, internal communication and responsibility and decision delegation. Expanders were solving these problems, and designing a new strategy to reach bigger clients and close deals for broader and more holistic services they called Think-Create-Reach. This strategy was focused on analyzing the needs of the client, designing strategy of digital marketing, and implementing this strategy.

It is November 2017, and Rene A. Cossio and his associate Jorge Magnus, both shareholders in the startup, were considering a proposal from a Spanish international company Management & Research (M&R) directed by Jesus De La Corte, to acquire a controlling percentage (55%) of the company. This agreement would not provide them with any financial investment. Expand.it would receive 8 million MXN in sales over the period of the next two year, and would get access to the clients of M&R, which included international corporations, political parties, government institutions and social enterprises in various countries of Latin America, Europe and North America. The case focuses on the need to take a decision on the matter, and the evaluation of the options the partners have.

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# **Gunnels and Son**

Christopher M. Cassidy,  
Sam Houston State University

## **Case Objectives and Use**

The objective of the case is for students to integrate the conflicting professional and personal demands for Gunnels and Son, at the end of the first year, and again after several years. Students are asked to evaluate: changes in the firm's external environment, internal governance conflicts and the need to change company strategy.

The case is designed for undergraduate courses in entrepreneurship, small business development, or strategy where students are asked to make strategic decisions when a course of action is unclear.

## **Synopsis**

Founded and operated by Ron Gunnels in 2014, Gunnels and Son provided portable restroom services to oilfield companies. Dependent on the market success of the oilfield companies, Gunnels and Son started operations in a niche that had the potential to be highly profitable. Although there were significant risks, Ron could possibly grow his company alongside the petroleum industry.

One conflict arose because Ron is a devoted father who would prefer to work less and spend more time with his daughter than work hard and miss his daughter's early years. Ron was also risk adverse and did not want to make irreversible investments in equipment unless high profits were likely. Advisors encouraged Ron to expand. Ron wondered what to do.

Part A of the case asks the reader to put themselves in Ron's shoes at the end of 2014, when the price of crude oil dropped abruptly, leaving the future of the company in jeopardy. Added to this was the nasty internal conflict between Ron and his business partner, his father. Part B of the case asks the reader to consider any strategic changes that should be made after the price of crude oil recovers in 2017.

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# **Sharing Academy: Introducing Peer-Tutoring in Spanish Universities**

PAUL FOX, LA SALLE – UNIVERSITAT RAMON LLULL  
JOSEP LLUIS CANO GINER, ESADE BUSINESS SCHOOL – UNIVERSITAT RAMON LLULL

## **Case Objectives and Use**

Courses and levels for which this case is suitable:

The Sharing Academy case has been designed to be used in courses in Management in general, and especially in Digital Business, Entrepreneurship, Strategy, and Information Systems. The case is suitable for various audiences. While designed with undergraduate business students in mind, Sharing Academy could also be used as a good introduction to multi-sided platforms and sharing economy platforms for an MBA course (full-time, part-time, or Executive MBA), as well as for other executive programs or in-company training.

Theme

Two-sided networks are difficult to manage because companies have to decide: (1) how to manage both sides; (2) which side is going to pay; (3) how to monetize the business model. (4) how to grow and scale.

Learning objectives:

- Diagnose the current situation of the Sharing Academy, an early-stage, digital platform-based start-up, and analyze alternative strategies for sustainable growth.
- Analyzing data.
- Developing the skills needed to understand graphs and figures so that one can draw the right conclusions.
- Understanding the benefits and challenges of creating a scalable, digital, multi-sided platform that depends on the recruitment, activation, and retention of external actors for success.
- Analyzing the business model design of a digital platform-based start-up
- Analyzing the major decision to iterate, pivot or straddle the business model of a digital platform-based start-up.
- Drawing up a sustainable growth strategy for the future of a digital platform-based start-up.
- Evaluating internationalization decisions, including market choice and the approach to internationalization.

## **Synopsis**

Jordi Llonch founded Sharing Academy in 2015, a peer-to-peer tutoring platform, with the goal of slashing university drop-out rates by giving struggling students the help they needed. By summer 2017, the company had grown to over 9,000 members from 53 universities in Spain, with 1,500 tutors offering over 10,000 courses. However, Jordi was having trouble raising the money needed to make the firm grow. Without further investment and with signs of slackening growth, Jordi was facing the classic start-up dilemma: Pivot, Persevere, or Straddle (pursue two different business models in parallel).

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# **Bake Parlor Goes Italian – Boosting the Pasta Category In Pakistan**

Jami Moiz, Institute of Business Administration, Karachi, Pakistan  
Nida Aslam Khan, Institute of Business Administration, Karachi, Pakistan

## **Case Objectives and Use**

The case can be used in a faculty seminar (such as a seminar on rebranding processes or on teaching by the case method), or for an undergraduate class in marketing. The objectives are:

1. Review the new product launch cycle to understand the process of new product development and marketing
2. Understand the difference between product market matrix, and product line-brand matrix
3. Explore and comprehend situations where each matrix will be applied separately, and together. Evaluation and assessment of approaches to understand when to apply which model.

## **Synopsis**

This is a work-in-progress teaching case along with a teaching note. In 2015, Bake Parlor, headed by Hassan Mahmood, was faced with the challenge of introducing the pasta product line in the Pakistani market. The Pakistani market – at large – had been unfamiliar with the pasta category, and saw it as a complex and an expensive dish to prepare. The product marketing director, Rab Nawaz, was to resolve the challenge using strategic marketing ideas that would not only influence the launch of the pasta category, but the overall brand value of Bake Parlor as well.

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# MARKETING AND INTERNATIONAL BUSINESS CASES

Cases	Authors
Tequila Ambhar: Designing a growth strategy for the U.S. market	Silvia Cacho-Elizondo Mary Conway Dato-on
Bumbox: Who should my target customer be?	Doreen Kum
Carving a Niche in a Crowded Market: e-Emphasis ERP	Ajit Vilas Patil
WWF Singapore Promoting Sustainable Seafood	Doreen Kum
Should you need a service or a helping hand, the social network <a href="http://Allovoisins.com">Allovoisins.com</a> will ring 10 millions' bells for you!	Catherine Lejealle
Brita & Stephen Curry	Michael Goldman Max Duran
CapitalCare Foundation - An Identity Crisis	Mark Arnison Sherrell Steele Bob Graves
"We Are Love" - Setting the Price for My First Painting	Gustavo Calatrava Javier Jorge Silva
A road to adventure with happiness: From students to senior citizens!	Sabyasachi Dasgupta Priya Grover
Snakes & Lattes	Eric Dolansky

# **Tequila Ambhar: Designing A Growth Strategy For The U.S. Market**

Dr. Silvia Cacho-Elizondo, IPADE Business School  
Dr. Mary Conway-Dato-on, Rollins College

## **Case Synopsis**

Jaime Celorio arrived at Tequila Ambhar in 2013 when the brand was immersed in financial and image problems. Jaime dedicated himself to reconfiguring the positioning of Tequila Ambhar, establishing it as a product of high quality and sophistication for knowledgeable consumers.

With this conviction, Jaime worked with consultant Oscar García Orozco to modify product and marketing components and perfect the production process to create a 100% agave handmade tequila with a premium positioning. The brand's U.S. market distribution was based on strong regional alliances, including exclusivity of key on-premise consumption outlets. In 2014, Jaime and Oscar took the repositioned brand to Mexico to reinforce the product's authenticity as a 100% Mexican brand.

In 2017, the current year of the case, Jaime believed the time is right to raise the bar on Ambhar's positioning and distribution in the U.S. market. He carried great expectations for the product; with the support of the Board of Directors he intended to develop a commercial plan that increases market share by 30%. Jaime and Oscar were at odds for the best way to proceed with a plan. Oscar believed the next logical step was to strengthen strategic alliances in order to reinforce the distribution network and increase points-of-sale in the U.S. Jaime, on the other hand, thought it was more important to improve branding to make the tequila more "authentic" and "closer" to the consumer.

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# **Bumbox - Who Should My Target Customer Be?**

Doreen Kum, National University of Singapore

## **Case Objectives and Use**

This case is best suited for undergraduate students in marketing, entrepreneurship, logistics, and strategy classes.

After the completion of the case, students should be able to:

1. Understand the e-commerce and logistics business environment in Singapore, specifically last-mile deliveries.
2. Understand the challenges of the introduction phase of a product life cycle.
3. Understand primary versus selective demand.
4. Learn about the consumer behaviour involved in establishing habits.
5. Understand the differences between B2B and B2C marketing.
6. Recognise the difficulties a start-up faces to penetrate an existing value chain.
7. Appreciate the importance of resource requirements to meet market conditions.

## **Synopsis**

Bumbox was a business in smart lockers. Ron Wong, Bumbox's Executive Director and Co-founder, was deliberating over options to help the start-up capitalise on the popularity of e-commerce in Singapore. Ron and his co-founder were fully aware that the scale of the business, specifically the number of smart lockers it has, determined its success. Yet the expansion of its network of smart lockers depended on the growth of their usage, in a chicken-and-egg relationship.

The start-up was in its infancy days with a lean management structure and resources. Smart lockers were also a relatively new concept in Singapore, with the national postal service as Bumbox's main competitor. However, the potential of the e-commerce market and the value of smart lockers to the host of last mile delivery problems faced by logistics companies and consumers promised an attractive opportunity.

This case provides insights on the last-mile delivery logistics business in Singapore and presents the potential growth options available to Bumbox. Ron must decide which path to take to bring Bumbox to the next level.

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# Trivium Industries: A New Venture in Bio-Degradable Plastics

Mark Parker, Alejandra Ruiz Aguirre

## Case Objectives and Use

The case attempts to take students through the methods of defining generic and marketing strategy, and places an emphasis on the role Corporate Social Responsibility may play in defining a differentiation strategy and competitive advantage. Students are encouraged to utilize various figures to undertake quantitative measures and justify their decision. It provides an opportunity for rigorous and in depth analysis and exposes students to the challenges of marketing and strategy for a new entrepreneur.

## Synopsis

Disclosure: Professor Parker has served as Director – Emerging Markets, for Trivium Industries, on an advisory basis. David D'Angelo, a recent business graduate and recipient of the young entrepreneur of the year award, decided to follow in his father's footsteps and embark on an entrepreneurial career. At 21 years of age he started his own new venture, Trivium Industries. The company was established as a small-scale niche player in plastics packaging. Its focus was on producing customised packaging for specialised manufacturers using conventional plastic materials. As part of his growth strategy, David explored incorporating innovative bio-degradable plastic containers into his product portfolio. This was in response to rising concerns over environmental issues and as a means of establishing a differentiation position. The question for Trivium was whether it was feasible to incorporate this innovative material, considering various challenges and customer opportunities.

The material considered for production was polylactic acid (PLA), a resin derived from renewable sources such as corn. Its bio-degradability could only occur under specific conditions. This, as well as various concerns about its use from collaborators and consumers, made this effort a challenge. Nevertheless, there was optimism about its growth potential, with some forecasters calling for a five-fold increase to 2020.

Trivium identified three market segments where the new product could be displaced – specialty beverages and food, pharmaceuticals and organic cosmetics and personal care products. While all sectors offered reasonable growth opportunities, there were some concerns. Food packaging was a highly competitive low margin sector, while pharmaceuticals had stringent regulatory requirements. Organic cosmetics appeared well positioned to accept the product, as it was aligned with their brand image and required customised packaging as part of brand building. Trivium also considered applications for traditional plastics in the local wine and beer sectors. Global experience pointed to greater acceptance of plastics in these applications.

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# Carving a Niche in a Crowded Market: e-Emphasis ERP

Ajit Patil, Sydenham Institute of Management Studies, Mumbai, India

## Case Objectives and Use

This is a Marketing case which can be used for the Entrepreneurship class as well. It is a story of North Carolina based Indian-American entrepreneur siblings who are technocrats. Milind and Sayam Bagade were born in India and migrated to America in the early 2000. During the initial years they worked for BAAN ERP and mastered the technology and marketing aspects. They became well-known experts of BAAN ERP globally. After a successful effort to solve unique and most difficult customer problem, they ventured into an IT start-up. They focused on their passion with patience and persistence and created an organization which spread globally and served international clients. They carved a niche in the crowded ERP software market. This is a true story which depicts their dilemma whether to venture into an IT product business or to continue in the IT consulting services.

## Synopsis

With their dedication, determination and hard work they started development of a product that was based on the BAAN ERP system. Even when the parent company, BAAN, itself was not doing well, Milind had conviction that they could successfully build and market their new product. All the 'heavy construction equipment and vehicle' manufacturers used sophisticated ERP system. However, their dealers and rental companies remained outside the scope of those ERP systems. The manufacturers wanted to extend the reach of their ERP to include dealers and rental companies to improve their effectiveness and efficiency at the market place. This would help the manufacturers in better forecasting, inventory management, and in managing other operational aspects. Milind saw an opportunity in developing a specialised ERP system, e-Emphasys ERP, for dealers and rental companies which could be connected to any ERP system of the manufacturers through an interface software, Integrator. The Integrator was critical because different manufacturers used different ERP systems. e-Emphasys development team faced many issues in the new product development which are discussed in the case in the context of the business environment which prevailed in the ERP industry. These product development issues became more pinching because of the economic slowdown which hit the software industry very hard.

Sayam, the younger sibling and COO of the company was apprehensive about the investment in the product development. He was not sold on the idea to transform the IT Consulting Services company to an IT product company. He wanted to remain in the field where they succeeded rather than entering new waters. But Milind, the elder brother was charged with the mission to radically reform the focus of the company and transform e-Emphasys into an IT product company. He felt the merits of the product business out-weighted demerits.

The case study covers a powerful crossfire between two experienced technocrats and successful businessmen. This is a dilemma-based decision-making case which can generate enough heat and discussions in the class to forge the skills and knowledge of the students. Care has been taken to make both options very strong so that it would be a real leadership challenge to build consensus among the student teams. To that extent this case will generate a lot of interest in the classroom discussion situation. The case doesn't give any clue about what happened thereafter and which way the balance tilted.

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# WWF Singapore Promoting Sustainable Seafood

Doreen Kum, National University of Singapore

## Case Objectives and Use

This case can be used in an undergraduate seminar in a core marketing course to discuss the role of triple bottom line or social concept in marketing. Its perspective from a NGO provides a contrast to conventional marketing cases. It is also well-suited for an ethics seminar, to discuss the issue of the scope of sustainability and considerations of stakeholders. The instructor may also use it in a communications class to focus on the campaigns and outreach activities WWF can embark on using the field interviews and survey results provided in the case.

This case aims to:

1. Expose students to the notion of social marketing, where individuals may not perceive the benefits immediately, but change is needed for society to benefit as a whole in the long run.
2. Provides insights on the seafood industry and consumer culture in Singapore with regards to seafood.
3. Understand the difficulties of managing multiple stakeholders with different priorities.
4. Allow students to propose communication tactics based on the case's information.

## Synopsis

Singapore is a country with a great appetite for seafood but imported almost all of it. 75 per cent of the popular fish consumed there were reportedly not responsibly caught. World Wide Fund for Nature (WWF) Singapore advised that the oceans may run out of fish by 2048 if such consumption patterns persisted.

Kim Stengert, Chief of Strategic Communications in WWF Singapore, shared the organization's past efforts to encourage sustainable seafood consumption in Singapore, as well as their challenges faced in driving sustainability through the seafood value chain to effect the necessary change. Through field interviews and a survey with consumers, this case provides the different perspectives of the various stakeholders involved. While changing to "preserve the world" seems to be a good thing for everyone, what needs to be done, and more importantly, who needs to bear the price of change, is not so apparent. What should Stengert do?

A video supplement of the highlights of the interview and the local seafood scene accompanies this case.

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# **Should You Need A Service or a Helping Hand, The Social Network Allovoisins.Com Will Ring 10 Millions' Bells For You!**

Catherine Lejealle, ISC Paris

## **Case objectives and use**

The case is designed for and used in Digital Marketing or growth strategy courses in college, state universities, business school or executive education. It would work well in most digital or business courses and focus on start-up development. According to Bloom's taxonomy, students will have the opportunity to do the following:

- Analyse a situation with Osterwalder's canvas business model and persona
- Develop and evaluate alternatives of growth
- B2B2 strategies or brand awareness solutions or active community
- Assess all 3 alternatives to identify the most relevant solution for the company
- Discuss about the strategy in terms of decision-making in order to generate an action

## **Synopsis**

Hello Neighbours is an application bringing neighbours together to give a helping hand should you need someone to mow your lawn or rent you a drill. This collaborative social network register 3250 new connexions every day and will reach 2 million users at the end of 2017. Early December 2017, the CEO Edouard Dumortier has a meeting with potential investors and needs to come up with a relevant strategy and convince them to invest money in the start-up. How will he find active neighbours that make transactions?

Based on an existing company with primary data, the case offers the opportunity to find and assess various growth solutions as well as to discuss brand awareness in general. The following issues could be discussed:

- Brand awareness (top of the mind, spontaneous awareness...)
- Online virtual community and customer's online engagement
- Online platforms growth and scalability, sharing economy usages and paradigm shift from owning to using, persona creation
- B2B2C strategies to growth and scale up, Osterwalder canvas to express the business model

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# **Brita & Stephen Curry**

Michael M. Goldman, University of San Francisco & University of Pretoria  
Maximillian Duran, University of San Francisco

## **Case Objectives and Use**

The case is best suited to a graduate-level course in marketing or sponsorship. It can also be used in an executive education program, where the focus would be more on the strategic decision to sign on Stephen Curry and an assessment of the four strategic alternatives. Although focused on management decision-making, the case could be used in an undergraduate-level business course, where the focus would be more on understanding product marketing through athlete sponsorship.

By the end of this case study, students will be able to:

1. Understand the nature of athlete sponsorship by a consumer brand.
2. Analyze the brand positioning of a consumer brand.
3. Critique the brand fit between an athlete and consumer brand.
4. Assess strategic alternatives and argue for a preferred decision.

## **Synopsis**

The Brita & Stephen Curry case study is set in the U.S. water filtration industry in the first half of 2016. The case documents the initial period of market-leader Brita's sponsorship of Golden State Warriors' point guard Stephen Curry. Although the announcement of the sponsorship deal had generated substantial and positive reaction, sales of Brita products continued to decline six months into the period of the deal. The case explores the marketing activities undertaken by Brita's Director of Marketing, Tad Kittredge, and the four strategic alternatives he and his team were considering in mid-2016 to reverse the sales decline.

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# **Capitalcare Foundation – An Identity Crisis**

Mark Arnison, MacEwan University  
Sherrell Steele, MacEwan University  
Bob Graves, MacEwan University

## **Case Objectives and Use**

This case is intended for use in an undergraduate marketing management course. It is designed for students to explore the concept of positioning. It could also be well suited to an undergraduate introduction to not-for-profit management course discussing positioning, branding and fund-raising.

The learning objectives for the case are to have students:

- Analyze the market position of not-for-profit organization
- Develop a positioning plan for the organization
- Discuss the differences and similarities between for profit and not-for-profit positioning issues

## **Synopsis**

In winter 2018, Sherry Schaefer, the Director, Foundation & Community Engagement at the CapitalCare Foundation was facing an organizational identity problem. Her Foundation, based in Edmonton, Alberta, Canada, was responsible for raising donations to support equipment and enrichment programs needed in the long-term care facilities operated by the CapitalCare group. That group provided long-term housing and medical care for sick and elderly people who could no longer live their lives in their own homes. The CapitalCare Foundation existed in an environment with many larger charities competing for the donation dollar. Donors did not understand the CapitalCare's need to raise funds, nor did they understand the structure of the organization and its place in a publicly-funded health care environment. Current marketing efforts were proving to be only moderately effective. The "grey wave" of baby boomers entering their senior years was going to put significant pressure on long-term care facilities, and Schaefer had to find a way to help her donors understand CapitalCare and its importance in meeting society's needs.

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# **“We Are Love” –Setting the Price for My First Painting**

Gustavo Calatrava & Javier Silva  
IAE Business School – Universidad Austral

## **Case Objectives and Use**

This case aims to encourage students to develop a thorough understanding of the different criteria regarding price formation, as well as an understanding of the concepts of value and price and the difference between them. Pricing a piece of art is as difficult as any other price setting process, albeit aggravated by its high emotional content.

This case has been developed as an introduction to the pricing issue in MBA programs. However, given its simplicity, it could also be used in undergraduate programs.

Key Words: Prices – Pricing – Value – Artworks – Emerging artists.

## **Synopsis**

“*We Are Love*” presents the real story of Federico Koch, an emerging visual artist faced, for the first time, with the possibility of selling one of his works. In spite of his background in sales, he clearly perceived that determining the selling price of a piece of art was different to everything he had known.

A potential buyer had contacted Federico to express interest in one of his pieces, a painting, and he had to put a price on it. Unable to do so, he asked for help.

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# **A Road to Adventure With Happiness: From Students to Senior Citizens!**

Sabyasachi Dasgupta, O.P. Jindal Global University  
Priya Grover, Symbiosis International (Deemed University)

## **Case Objectives and Use**

Position in course: (Both post graduate & undergraduate management courses):

Marketing Management, Consumer Behavior, Entrepreneurial Marketing, Integrated Marketing Communication, Logistics Management

Learning objectives:

- To define problems faced by a start-up
- To apply theoretical models related to this case
- To analyze the issues and challenges of the business model
- To create a business model for sustainability of a start-up.

## **Synopsis**

This case dates back to 2017 revolving around three budding entrepreneurs studying in a prestigious university in Haryana, India. A collaborative initiative by Abhishek Ganesh and Shine Varghese Saji to make the Onam festival in their university a huge success among their fellow mates initiated their journey of entrepreneurship. The company, The Great Expedist came into existence as a Partnership Company under the treasurer's name, that is, Anurag Bansal and started business from 5<sup>th</sup> February, 2017. The aim of the company was to provide relaxing weekend gateways at high quality but at an affordable price. The entrepreneurs faced a lot of challenges including resistance from vendors, hoteliers and even students from other universities. But with their sheer grit backed by full support from their university entrepreneurship cell, they overcame the challenges smoothly. But the issue of pricing was of prime concern for them. With students being a price sensitive market coupled with vendor issues, they found it difficult to earn revenues. So, they decided to opt for mark-up pricing and offered 15 % mark up on the costs incurred by the company in arranging for hotel, travel and other logistic arrangements. With passage of time and enhancement of negotiation power, they decided to offer more value oriented services at similar price points. This enhanced their profit margins due to increase in volume of sales. The company wanted to enhance their profits and diversify, promote and research all of which required a lot of money. So, they are stuck up with a dilemma. Should they stick to their current target group of students or diversify to the segment of senior citizens or a completely new segment?

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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 2018 Conference, Orlando, FL, October 4-6, 2018 by Dr. Sabyasachi Dasgupta, Assistant Professor, O.P. Jindal Global University, Sonapat, Haryana, India, [sdasgupta@jgu.edu.in](mailto:sdasgupta@jgu.edu.in), 8308946369 and Dr. Priya Grover, Associate Professor, Symbiosis Institute of Media and Communication (SIMC-PG), Symbiosis International (Deemed University), Pune, India, [priyagrover0123@gmail.com](mailto:priyagrover0123@gmail.com), 9897214320.

# **Snakes & Lattes**

Eric Dolansky, Brock University

## **Case Objectives and Use**

This case is designed to be used either at the beginning or end of a general marketing case course, at the graduate or undergraduate level. If used early in the course it can introduce a framework and structure for making marketing decisions, as well as introducing a wide range of marketing topics (4 Ps, segmentation, targeting, positioning, consumer analysis, competitive analysis) in a digestible way. If used late in the course it can be a capstone case, to bring together the various topics already covered in the course, and test/reinforce the concept of fit between strategy and tactics. For this reason (and the possibility of quantitative analysis) it can also work as an exam case.

## **Synopsis**

Aaron Slade, CEO of Snakes & Lattes (S&L), was tasked with overseeing the ambitious growth plan for the company. Snakes & Lattes was a chain of board game caf  s in Toronto; customers could come and play board games, eat, drink, and have a good time. The firm had grown from one small location opened in 2010 to three locations in 2018, each larger than the last, and annual revenue had increased to \$7 million. The company had announced plans to sell franchises in about 20 North American cities and open three more company-owned caf  s. The immediate problem that Slade was wrestling with had to do with marketing strategy and communication. To date Snakes & Lattes had very controlled, centralized branding and communication, but each of the caf  s was different due to its location, clientele, games, and history. With each venue having its own character there was room for more decentralized marketing, but only if it was not to the detriment of the brand. Two factors complicated this further: the company was involved in many non-caf   revenue-generating activities, and the planned rapid growth would exacerbate the existing problem of individual character of each caf  . Slade needed a strong marketing plan to complement the growth in locations.

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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 2018 Conference, Orlando, FL, October 4-6, 2018.    2018 by Eric Dolansky. Contact person: Eric Dolansky, Brock University, 1812 Sir Isaac Brock Way, St. Catharines, Ontario, L2S 3A1, 905-688-5550, [edolansky@brocku.ca](mailto:edolansky@brocku.ca).

# ORGANIZATIONAL BEHAVIOR AND HUMAN RESOURCES CASES

Cases	Authors
Blackjack or Bust: Gambling on the Future	Shannon Kotylak
Transforming Padmore Primary	Rohan Wright Cynthia Onyefulu
Goal Setting Scandal at TD Bank Group: How Effective is Goal Setting in Motivating Employees?	Kimberly Crowe Meredith Woodward
Breaking the Mold: TASUS Overcomes its Labor Challenges	Diane Kutz Chrissann Ruehle
Boss Is not yet Pleased: Did the Performance Matter?	Rameshan Pallikara
The Recruitment Process at JC Premium Cars: There are no more Candidates?	Juan Parra Cindy Pinzón
Hailey's Handbags- Customer Complaints or Cyberbullying?	John Varlaro Nicole Amos Ezenwayi Amaechi
Quattro Global Services: One Woman Campaign Inculcating a Culture of Gender Equity in an Emerging Market	Grishma Shah Srinivas Rao Pingali
The Development and Reflections of a Black STEM Solopreneur	John Varlaro Ezenwayi Amaechi

# **Blackjack or Bust: Gambling on The Future**

Shannon J. Kotylak (student author), University of Regina

## **Case Objectives and Use**

This case was formulated for students at either the fourth-year undergraduate or graduate level. It was designed to primarily be taught in a leadership or specifically women in leadership course. It could also be used in a business strategy course, particularly if the balanced scorecard model is discussed.

The case is meant to expose students to a woman leader in a non-traditional field, to illustrate both how her experiences as a leader may differ from male leaders. SaskGaming, as a provincial government Crown corporation operates in two separate worlds: that of for-profit Casinos and as an arms-length government organization with unique struggles so it could be contrasted with either other government organizations or for-profits.

The objectives are:

- Identify and evaluate leadership style and effectiveness.
- Understand and explain the complexities that women leaders face in their career advancement and leadership journey.
- Identify and evaluate recommendations for leaders of companies operating within government but in a competitive environment with private companies.
- Evaluating the Balanced Scorecard Model of measurement and how it aligns (or does not align) with different leadership styles.

## **Synopsis**

In spring 2018, Susan Flett, President and CEO of the Saskatchewan Gaming Corporation (SaskGaming), needed to look at the organizational whole within the Balanced Scorecard model to determine a new five-year plan. As a government-owned commercial Crown organization, SaskGaming located in Saskatchewan, Canada returned most of its profits back to the provincial government treasury. The province of Saskatchewan was highly dependent on revenue from natural resources so when the prices of these resources reduced significantly for several years, the government looked to its Crown corporations to help make up the shortfall in revenue.

When Flett took over the organization in 2015, there had been five years of ongoing employee unrest and economic struggles both in the local economy and the government while dealing with a mature gaming market. She needed to regain employee trust in her and the executive team while also looking for efficiencies to ensure continued profitability for their main shareholder, the provincial government.

Committed to the Balanced Scorecard model of measurement (Kaplan & Norton, 1996), Flett needed to balance profits with her other three measures of success: employee experience excellence, guest experience excellence and social responsibility.

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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 2018 Conference, Orlando, FL, October 4-6, 2018. © 2018 by Shannon J. Kotylak. Contact person: Shannon J. Kotylak, University of Regina, 3737 Wascana Parkway, Regina, SK SJ.Kotylak@uregina.ca



# **Transforming Padmore Primary**

Rohan Wright, The Mico University College (Jamaica)  
Cynthia Onyefulu, The University of Technology (Jamaica)

## **Case Objectives and Use**

This case starts by following the protagonist as a staff member at one educational institution, where she encountered interpersonal conflict with the school Principal. After a life-threatening health scare, she was seconded to another school nearby where she was promoted to the position of Principal. In this assignment, the protagonist was to oversee the closure of the school as it was recording very high failure rates and very low enrolment. She instead implemented a plan to boost staff morale, took the risk of investing her own money into the public institution and improved the school's performance in an effort to lobby the relevant authorities to keep the institution running.

Through this case, students should be able to:

1. apply relevant motivation theories to explain why the protagonist chose to keep the school open;
2. evaluate the factors (whether situational, cultural, social, economic and political) impacting the specific decisions and actions the protagonist took with regards to keeping the school running, and how these may impact leadership efforts generally;
3. justify the most appropriate leadership style to employ based on the variables present in a particular situation; and also
4. examine leadership actions vis-à-vis educational leadership theories.

This case was written to be used in courses such as Psychology, Organizational Management, Management of Educational Resources, and Educational Leadership: Theories and Perspectives, as well as Leading and Managing Change and Improvement in Education.

## **Synopsis**

This case presents the sequence of events that lead Hayle, a Grade 6 teacher to be seconded as principal of a failing primary school in September 2011. The Ministry of Education, Youth, and Information ordered that it be closed down following recommendations from the National Education Inspectorate.

The failure rate was very high, staff morale was low, and the institution was in financial ruin. Hayle was working at another school in the area when a spat between her and the Principal drove her to the hospital. She applied for the temporary position at Padmore Primary in hopes that it would give her a much-needed break. Her only duty was to oversee the closure of the institution and to manage the necessary administrative processes to successfully do so.

Weeks before the semester started, Hayle met with the staff and also spoke to parents of students at the school. During their conversations, Hayle realized that the community did not want the school to close and she felt confident that she could address the issues plaguing the institution, despite plans by the education authority to close it down. The case explores motivation and the specific leadership moves Hayle took to correct the financial status of the institution, boost staff morale and improve student enrolment, attendance and performance. It also highlights the risks and personal sacrifices she took to accomplish this and the approach she took to overcome the struggles she encountered along the way.

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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 2018 Conference, Orlando, FL, October 4-6, 2018. © 2018 by [Rohan Wright and Cynthia Onyefulu]. Contact person: [Rohan Wright, The Mico University College, 1a Marescaux Road, Kingston, 876-764-2839, rhnwright@gmail.com]

# Goal Setting Scandal at TD Bank Group – How Effective Is Goal Setting in Motivating Employees?

Kimberly Crowe, Wilfrid Laurier University  
Meredith Woodwark, Wilfrid Laurier University

## Case Objectives and Use

This case is designed to be used in a senior undergraduate or graduate level course. The objectives are:

- to examine the benefits and risks of goal setting practice in organizations
- to review the best practices for setting goals in organizations
- to discuss how organizations should address and prevent out of control goals within organizations

## Synopsis

The case takes a closer look at the Canadian Broadcasting Corporation's ("CBC") *Go Public* investigation into the unethical upselling tactics of retail bank branch employees at TD Bank Group ("TD"). On March 6, 2017, three TD employees, two retail branch Managers and a Customer Service Representative, were the first to come forward to the *Go Public* program to share how sales targets set by TD led branch employees to aggressively upsell customers on unneeded financial products. The TD employees interviewed by *Go Public*, noted that sales targets "more than tripled in the past three years" and because of this they struggled to act ethically and do what's right for the customer or meet the challenging sales targets.

After the initial *Go Public* report aired, hundreds of current and former TD employees contacted the program to share how they also used aggressive upselling tactics to meet sales targets. Many of these individuals said they even went as far as breaking the law by signing customers up for financial products without their knowledge to meet their goals. The constant pressure to meet goals caused some employees to go on medical leave due to anxiety and others described their work experience with TD as "poisoned," "stress inducing," "insane" and having "zero focus on ethics."

The case looks at the incident from the perspective of TD CEO, Bharat Masrani. He is reflecting on the recent investigation and how he should respond to the allegations at the upcoming TD Annual General Meeting ("AGM"), which is only a few weeks away on March 30. Masrani is interested to understand how TD goal setting and performance management practices could be enhanced and implemented to motivate employees to achieve sales targets in an ethical way. Furthermore, he seeks to understand the balance between setting challenging obtainable goals and unrealistic goals that negatively motivate employees and cause them to act unethically.

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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 2018 Conference, October 4-6, 2018, Orlando, FL. ©2018 by Kimberly Crowe and Meredith Woodwark. Contact person: Meredith Woodwark, Wilfrid Laurier University, Waterloo, ON, [mwoodwark@wlu.ca](mailto:mwoodwark@wlu.ca).

# Breaking the Mold: Tasus Overcomes Its Labor Challenges.

Diane Kutz, University of North Alabama  
Chrissann Ruehle, Florida Gulf Coast University  
Faculty Supervisors: Janis L. Gogan, Bentley University, and  
Matthew Mullarkey, University of South Florida

## Case Objectives and Use

This case is designed to be used in an undergraduate Management Principles course. Subsequently, it has been successfully tested during development in an undergraduate International Business course and a doctoral seminar on case research methods. Student learning objectives include:

- Analyze a human resources challenge in light of Resource Dependence Theory.
- Evaluate a company's competitive position using the Cultural Values Framework.
- Identify and analyze examples of Servant Leadership, Leader-Member Exchange Theory and Organizational Citizenship Behaviors.
- Formulate appropriate and effective tactics to attract, engage and retain skilled workers, particularly millennials.

## Synopsis

In August 201x, the Plant Manager of a manufacturing facility, in rural Florence, Alabama, confronts a problem of employee retention. Denny Tester, Plant Manager at TASUS has a standing phone call with the production manager on Sunday night and the Technical Processing Team on Monday morning to establish weekly priorities. Staffing issues are looming in Denny's mind since a key staff member had submitted his letter of resignation the previous Thursday and Denny still needs to share this information with the whole team. This event highlights a question that has bothered Denny for the past few months and over the past weekend: *How are we going to recruit and retain associates, given the increased competition from new manufacturers that are moving into the Northwest Alabama area?*

TASUS, a company headquartered in Indiana, produces plastic parts used in automobiles. The decision in 2012 to locate this plant in rural North Alabama was based on a desire to be close to automotive customers and tier one suppliers, and to take advantage of an abundance of local labor. Recently, an influx of other manufacturing companies in the area is creating a labor challenge.

Besides the shrinking supply of available local workers, Denny is concerned about another personnel challenge: it seems to him that younger workers are seeking higher levels of fulfillment on the job; they do not appear to share the work ethic of older, experienced managerial employees. This creates occasional conflicts and other personnel challenges. In a highly competitive landscape in which prospective employees have multiple choices of manufacturers, how can TASUS differentiate itself from its competitors in the war for talent, and how can it fully engage and retain its workers?

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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 2018 Conference, Orlando, FL, October 4-6, 2018. © 2018 by Diane Kutz and Chrissann Ruehle. Contact person: Diane Kutz, University of North Alabama, Florence, Alabama, 256-765-5076, [dkutz@una.edu](mailto:dkutz@una.edu)

# **Boss Is Not Yet Pleased; Did the Performance Matter?**

P Rameshan, Indian Institute of Management (IIM) Kozhikode

## **Case Objectives and Use**

This case is useful in Graduate/Post-Graduate/Doctoral level courses in Business Administration and Management, in executive education programmes, and in management training. It is specifically useful in courses related to Organizational Behaviour, Leadership, Human Resource Management, Strategic Management, Corporate Governance, and Organizational Ethics.

Key objectives: (1) To get insights into how leadership and governance practices affect organizational culture and employee morale. (2) To apply relevant leadership, corporate governance and motivational theories to organizational practices (3) To explore possible approaches to deal with undesirable organizational/leadership practices and decay of organizational culture.

## **Synopsis**

The case is about the experiences of Raamit Pell, a middle-level executive, at Concoctia Management Services, which was a provider of higher education services, and his encounters with a new boss, Pret Sohn. Raamit Pell had joined Concoctia at a time when the organization was undergoing some political and cultural turmoil. As a result, when Pret Sohn came as the new CEO a little later, in early 1998, there were a lot of expectations among executives in general and for Raamit Pell in particular. Pret Sohn initially gave impressions of his intent to follow a fair approach. However, soon he began pursuing unethical and discriminatory practices. He began mistreating executives based on his perceptions. Raamit was a victim of Pret Sohn's attitude as he had joined Concoctia during the tenure of the previous CEO, with who Pret Sohn had some past professional rivalry, and since Raamit did not establish his personal loyalty as required by Sohn. Raamit was denied a well-deserved promotion even as Pret Sohn promoted other much-less deserving executives by virtue of their personal equation with him.

Raamit subsequently decided to leave the organization as he received an offer from another organization. When he put down his papers, Pret Sohn was surprised and shocked as he did not expect Raamit to leave. Some time after Raamit left Concoctia, he was happy to learn that the Board of Concoctia forced Pret Sohn to leave on some issues. He was still six months away from his original tenure. Raamit was happy that Sohn's deeds had finally caught up with him. However, when a major stakeholder nominated Raamit to the governing body of Concoctia, Raamit's joy reached its zenith. Yet, at various time points after he decided to resign and even after he left Concoctia, Raamit was not sure whether his decision to quit was justified.

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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. Names of people and organizations have been disguised. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2018 Conference, Orlando, FL, October 4-6, 2018. ©2018 by P Rameshan. Contact person: P Rameshan, Professor, IIM Kozhikode, IIM Campus PO, Kozhikode, India. +91-495-2809431. [rameshan@iimk.ac.in](mailto:rameshan@iimk.ac.in).

# **The Recruitment Process At Jc Premium Cars: There Are No More Candidates?**

Juan M. Parra, INALDE Business School – Universidad de la Sabana  
Cindy Pinzon, INALDE Business School – Universidad de la Sabana

## **Case Objectives and Use**

This case was originally developed for a required HR course for second-year EMBA students and for Executive Education programs, but it can be also illustrating to MBA and undergraduate students. It is interesting in that it provides an example of the typical problems of recruitment processes (i.e. too narrowed criteria for searching, conflicting objectives between decision makers, unclear criteria for selection between candidates, etc.). It also illustrates the ambiguous outcomes of each stage on recruitment activities (DISC profiles, interviews, assessments, etc.), in terms of assuming that those stages can tell, with absolute certainty, who is the best candidate for a specific position.

It can also be relevant for courses on the basics of decision-making, especially on criteria for selection between similar alternatives. Because the case is useful for learning the basics of decision-making, it is not mandatory to have previous coursework or prerequisites to prepare the case adequately. After studying this case, students will be able to:

1. Understand the differences between the stages of a hiring process and the information they provide;
2. Take the role of a hiring manager and weight the available information about a group of candidates, in order to find out which information is the most relevant;
3. Evaluate which elements of the firm and its strategy are important to attract the required talent for a specific position, and develop criteria to establish the right fit between a candidate and the firm;
4. Identify the issues that should be addressed as part of the onboarding process, before a selected candidate holds the position.

## **Synopsis**

In December 2016, John Cortes –owner and founder of JC Premium Cars, a small BPO that offered financing and insurance services for car dealers- was about to hire a new Commercial Manager. However, although he had worked with a prestigious international executive search firm, he felt unable to decide between the three finalist candidates. Even more, each of the different stages of the selection process pointed to a different candidate. He also hoped to find his potential successor, now that he had sold his firm to a prestigious multinational bank that was in full expansion in Colombia.

Cortes had arrived with a practically elected candidate, but the last assessment left him uneasy. Not only had he lost his favorite candidate for a counter offer, but also he saw in his second favorite a behavior that surprised him negatively. Moreover, the other two did not fit completely with the profile he was looking for, despite what he had thought of them the previous two months. The recruitment process had begun with a fundamental instruction from Cortes to the headhunter: "I want the best and most experienced in the market." Although they had found a handful of candidates with a very specific experience, according to the market niche of the company and the criteria set by Cortes, in the end they concluded: "this is all we find". His new partners pressed him to make a decision as soon as possible, given that the position had become vacant two months ago.

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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 2018 Conference, Orlando, FL, October 4-6, 2018. © 2018 by Juan M. Parra & Cindy Pinzon. Contact Person: Juan Manuel Parra, INALDE BS - Universidad de la Sabana, Km. 7, AutoNorte, Chia, Colombia, +578614444, [juanm.parra@inalde.edu.co](mailto:juanm.parra@inalde.edu.co)

# Hailey's Handbags – Customer Complaints or Cyberbullying?

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

## Case Objectives and Use

The case focus is on a seldom-discussed issue—the potential for a small business owner or entrepreneur to be confronted by abuse and bullying at the hands of their consumers. In this case, the entrepreneur is faced with cyberbullying, escalating from unhappiness with some consumers' inability to purchase products. The case juxtaposes how the business model may be a direct cause of consumer angst, and yet within an online environment there may be a *no-holds-barred* attitude with comments and posts.

This is an interdisciplinary case, meant to be used in entrepreneurship, human resource management, management, or other classes where the discussion of cyberbullying and/or entrepreneurship may occur. Given the topic, the case may be used to both explore the impacts of cyberbullying within the workplace, or the impacts it may have on entrepreneurs. Further, the case lends itself to discussion on methods to mitigate such impacts, as well as exploration of students' own experiences with bullying. The objectives are:

- Compare workplace bullying, cyberbullying, and harassment with consumer complaints
- Identify resources available to the public concerning bullying
- Discuss the impact cyberbullying can have on an entrepreneur
- Discuss methods to minimize and deter cyberbullying

## Synopsis

Hailey was able to successfully launch her online fashion brand and has experienced exponential growth in sales. Part of the allure of her brand is the sales approach – short, limited-release items once a month to a growing online community. However, in early 2018, angst about limited release items and an inability to purchase has led to some consumers not just complaining, but also engaging in outright angry and aggressive social media posts. As Hailey manages the growth and expansion of her online fashion brand, she must also manage the impact the cyberbullying may have, not just on her online community, but also on her own personal well-being.

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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 2018 Conference, Orlando, FL, October 4-8. © 2018 by [John D. Varlaro and Nicole Amos]. Contact Person: [John D. Varlaro, Johnson & Wales University, 8 Abbott Park Place, Providence, Rhode Island, 02903, 401.598.1330, jvarlaro@jwu.edu]

# **Quattro Global Services: One Woman Campaign Inculcating a Culture of Gender Equity in an Emerging Market**

Grishma Shah, Manhattan College  
Srinivas Pingali, Quattro Global Services/Indian School of Business

## **Case Objectives and Use**

This case is appropriate for undergraduate and MBA courses. It can be used in an undergraduate Human Resource Management course or MBA courses with topics covering gender, diversity and executive leadership, specifically in a global context. At both levels, we find the case will be valuable in generating discussion on how to assess a firm's initiatives on increasing gender diversity with respect to recruiting and retention and further develop innovative strategies to increasing gender diversity at executive levels.

## **Synopsis**

Peri Malhotra joined Quattro Global Services (QGS), then a small start-up about ten years ago. She climbed the ladder rather quickly and is now the head of Employee Development at QGS. Admittedly, her journey is one in which there was always the right level of support and encouragement from the right people, even during very difficult personal times. She thoroughly understands that this was not a coincidence and prides herself on making sure every employee at QGS receives the level of development and support they need to continually challenge themselves and bring them to the next level. Nonetheless, recently, as she looked around table at a high-level meeting, she realized she was one of the only female executives at QGS. While she knew exactly what had gotten *her* there, it was clear from her presence in the room or more notably, the lack of others like her that QGS needed to work harder. After all, it was 2017. Fortunately, QGS was not at novice at understanding the significance of gender diversity, the benefits it brings and the growing demand in the industry. In 2015, it had initiated the One Women Campaign, designed to support, develop and celebrate women. However, after a two year run and much progress...the challenge remained...how exactly can QGS move from safety, recruitment, retention and support of women in the work place to noteworthy leadership roles? Were they doing enough and what else could they do better?

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The author developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. This case was written using documents provided directly by QGS senior level management. In some cases, senior level employees were interviewed for elaboration and/or clarification of the documents provided. While all characters are real, some names have been altered to protect the privacy of the individual. 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 4-6, 2018, Orlando, Florida. All rights are reserved to the author and NACRA. © 2018 by Grishma Shah and Srinivas Pingali. Contact person: Grishma Shah, Manhattan College Parkway, Bronx, New York 10471. T: 718-862-7461. [grishma.shah@manhattan.edu](mailto:grishma.shah@manhattan.edu)

# **The Development and Reflections of a Black STEM Solopreneur**

John D. Varlaro, Johnson & Wales University  
Ezenwayi C. Amaechi, Johnson & Wales University

## **Case Objectives and Use**

The case focus is on a common issue facing entrepreneurs—how to balance time between ventures. However, as the case relates the personal history of Monroe, it also gives students the opportunity to explore and reflect upon their own entrepreneurship, as well as ethnicity and race in the STEM economy, including the perceptions of and challenges faced by black entrepreneurs. This case, then, is meant to facilitate conversations concerning business ownership, diversity and the potential negative stigmas associated with minority business owners. The case accomplishes this through presenting quotes as the protagonist, Monroe, reflects on both the frustrations, as well as the opportunities specific to his blackness while making a strategic business decision.

The case is interdisciplinary and offers two specific directions, which may be separated or used simultaneously. First, the case may be used in an entrepreneurship, management, or another class where students may reflect upon the impact of business structures and their own entrepreneurial vision. As an example, in an introductory entrepreneurship course, the case facilitates discussion concerning individual drives towards entrepreneurship while understanding business structures and entrepreneurial mindset. Second, this case is may also be used within the context of diversity, so organizational behavior, human resource management and I/O psychology topical classes may also utilize this case. Given the foundation it provides, it could be used in undergraduate, as well as graduate-level class discussions for both entrepreneurship and organizational behavior. As the case relies on student reflection and discussion, it may be used alone, or combined with other assignments. The objectives are:

- Differentiate between legal business structures and its impact on the entrepreneurs personal and financial goals (Entrepreneurship)
- Develop awareness of entrepreneurial mindset (Entrepreneurship)
- Identify challenges faced by black entrepreneurs (HRM/OB)
- Identify the stigmas and challenges faced by black entrepreneurs (HRM/OB)

## **Synopsis**

Monroe's ability to freelance or 'gig' in software has led to his establishment of Glenmore, LLC. Along with his consulting in software, he has provided training to others in both business ownership and software; however, by mid 2017 an opportunity had arisen to transition the training into its own non-profit, LTED. Monroe must decide if he can continue to split his time between both, or if he needs to be fully devoted to one or the other to ensure the success of either venture. Complicating his decision is that as a software developer, an entrepreneur and a black immigrant from Jamaica, Monroe has had to navigate stigma, and thus the added pressure to succeed and not substantiate negative stereotypes.

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# SOCIAL ENTREPRENEURSHIP AND SUSTAINABILITY CASES

Cases	Authors
Maryland Information Sharing and Analysis Organization	Toufic Chebib
PSEG and the Promise of Wind Power	Stuart Rosenberg
The Rocket Stove: Results-Based Financing Through Carbon Credits	Rochelle R. Brunson Marlene M. Reed
For & From: Inditex Group's Social Franchise	Alfred Vernis
Can a Not-for-Profit Radio Station Survive in a Declining Industry with an Inexperienced Radio Manager?	Simon Medcalfe
The Beiteddine Festival: A Budget Gap	Lina Tannir
Ozark Natural Foods	David Graham Hyatt
Casa Andina Hotels	Remy Michael Balarezo Nuñez Paul Corcuera Mariela Garcia
Baldor Specialty Foods: The "SparCs" Challenge	Michelle DeMoss Ram Subramanian
Laureate Education, Inc.: Always Meant to Be?	María Ballesteros-Sola Elizabeth Ontaneda
Paw Works: From Shelters to "Furever" Homes	María Ballesteros-Sola Danette Wilcox Rose Sutton Brianna Ramos

# Maryland Information Sharing and Analysis Organization

Toufic “Tom” Nicolas Chebib, University of South Florida  
Janis Gogan, Bentley University

## Case Objectives and Use

This case can be used in MBA/graduate-level courses, in classes revolving around IT Entrepreneurship, Cybersecurity, Information Technology Management. The objectives are:

- Learn about a social enterprise in the Cybersecurity industry
- Explore different business revenue streams
- Explore the Porter Value Chain model

## Synopsis

This case describes how the Maryland Information Sharing and Analysis Organization (MDISAO), a cybersecurity services focused organization is trying to figure out the most optimal way for it to generate revenue and be self-sustainable. Knowing that this is a problem that many startups have. The MDISAO is more of a case of a social enterprise. The organization is trying to generate profit while doing good in its community.

Scott Ormiston, Co-founder, and president of the MDISAO was thinking of ways to optimally manage his organization while he was heading to a significant meeting with the Maryland Department of Commerce. The department of commerce requested his audience to explore what efforts has he and his partner Tom have done so far with their ISAO.

The Department of Commerce was interested in potentially backing up such an initiative for the State of Maryland. Scott still does not know to what capacity and what the State representatives were thinking about. This is a very important meeting for the MDISAO because if the representatives of the state decide to back the initiative, this will give Scott and his MDISAO a great deal of credibility while reaching out to potential members.

Scott is considering in his mind what is the best way of making his enterprise self-sustainable? Would he go the route of filling up grants and trying to see if he gets funding from various philanthropic institutes, potentially submitting for a grant to the National Institute of Science and Technology? There may be the route of soliciting sponsorships from local cybersecurity companies like Tenable, which is known for being one of the top cybersecurity companies in America and headquartered in the State of Maryland. Or charge members for a membership fee depending on their company size and tier of services they decide to purchase.

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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 2018 Conference, Orlando, FL, October 4-6, 2018. © 2018 by [Toufic “Tom” Nicolas Chebib]. Contact person: [Tom Chebib, University of South Florida, 4202 E. Fowler Ave, BSN3403, Tampa, FL 33620, [Cell: \(919\)809-9686, tchebib@mail.usf.edu](mailto:tchebib@mail.usf.edu) ]

# **Pseg and the Promise of Wind Power**

Stuart Rosenberg, Monmouth University

## **Case Objectives and Use**

This case is suitable for courses in Corporate Social Responsibility or for courses in Sustainability. It is appropriate to use the case in undergraduate courses to illustrate decision making in a regulated industry.

The expected learning objectives of this case are as follows:

1. To understand the tradeoffs involved in the use of each of the various sources of energy;
2. To assess a firm's responsibility to society in its business decisions; and
3. To identify the stakeholders involved in a firm's business decisions.

## **Synopsis**

Scott Jennings, a vice president at PSEG (Public Service Enterprise Group), the diversified New Jersey-based energy company, was the project leader for a large commercial wind farm that was to be built off the coast. The project, Garden State Offshore Energy (GSOE), a joint venture between PSEG and Deepwater Wind, an experienced developer of offshore wind projects, had been announced over three years earlier, in late 2008. In the time that had passed, the GSOE project team had waited for the New Jersey Bureau of Public Utilities (BPU), which had been tasked by Governor Chris Christie to evaluate the project costs before it could authorize the actual construction of the wind turbines. Justifying the project on a cost basis proved to be difficult; despite the growing public sentiment in favor of projects that utilized renewable energy sources such as wind power, the GSOE team was unable to move the project forward.

Scott's colleagues on the project team began to question whether it made sense to continue to hold regular meetings. They suggested that Scott speak with senior management at PSEG to find out if the resources that had been dedicated to the GSOE project could be shifted to other projects that might be more feasible.

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The author developed this case, which is undisguised and based on actual events, for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and instructor's manual were anonymously peer reviewed for presentation at the NACRA 2018 annual conference, Orlando, FL, October 4-6, 2018. © by Stuart Rosenberg. Contact person: Stuart Rosenberg, Monmouth University, Leon Hess Business School, West Long Branch, NJ 07764, 732/263-5297, srosenbe@monmouth.edu.

# **The Rocket Stove: Results-Based Financing Through Carbon Credits**

Marlene M. Reed, Baylor University  
Rochelle R. Brunson, Baylor University

## **Case Objectives and Use**

This case was written to be used in a social entrepreneurship course at the undergraduate or graduate level. It could be taught in the course at a point where the topic of funding for social entrepreneurship projects is discussed. Topics included in the case are: (1) the use of carbon credits in financing a project; (2) the operations of a non-profit organization in Africa; and (3) an example of results-based financing.

## **Synopsis**

This case describes the work of Jordan Kowalke, an employee of Total Land Care (TLC), in securing the commitment of African villagers to adopt the Rocket Stove. This stove greatly reduced the time of searching for wood on which to cook and reduced the amount of pollution going into the environment. The stove improved on the 3 stones and a pot that the women in Malawi had used in the past. This innovation was far more efficient in cooking food and putting less carbon emissions into the air thus allowing them to sell carbon credits. This was a new way of funding a non-profit by utilizing results-based financing which counted outputs of financing rather than simply the inputs. The problem Kowalke and TLC were experiencing in the Spring of 2018 was that only an average of 70 percent of the villagers had been willing to utilize this new method of cooking. Kowalke needed to find some means of increasing the acceptance rate of the new stove.

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# For & From: Inditex Group's Social Franchise

Ezequiel Reficco, EGADE, Tecnológico de Monterrey  
Alfred Vernis, ESADE, Universitat Ramon Llull

## Case Objectives and Use

The case was prepared for advanced undergraduate courses (BBA programs) and graduate programs (MSc and/or MBAs), assuming students are already familiar with notions on corporate strategy and the analysis of the social and environmental implications of business strategies, as well as with strategic analysis exercises. The learning objectives include:

- Understand what is and how to become a corporate social entrepreneur
- Learn how to align corporate social ventures with a company's core business
- Acquire the knowledge to understand and apply the Social Return of Investment (SROI) technique

## Synopsis

Starting in 2001, Inditex's Sustainability Department promoted with the Group's business units a unique chain that remained largely unknown to the general public: For&From. This labor inclusion project for people with mental disorders hinged on the creation of stores in collaboration with social organizations, following a franchising scheme. Inditex made an initial investment on these stores that maintained the image and quality that characterized the Group's chains. Inditex's brands sold their excess inventory at discount prices to these social enterprises, which, in turn, marketed them at outlet prices. The project intended to build an optimal support ecosystem for people with special needs, so that they would learn about retailing jobs, strengthen their self-esteem, and eventually manage to integrate themselves into society. This scheme relied on long-term partnerships with social organizations, with which Inditex built a hybrid value chain. By 2017, the program featured 13 stores in nine towns, with over 150 mentally-challenged employees, and it engaged five social organizations –namely, *Fundación Privada el Molí d'en Puigvert* ("Molí Foundation"), Moltacte, Cogami, APSA, and *Fundación Prodis* ("Prodis Foundation")– as well as five Inditex chains –Massimo Dutti, Bershka, Stradivarius, Oysho, Pull&Bear, and Tempe (a footwear and accessory manufacturer that supplied all chains).

In the ensuing years, the program grew gradually, and by 2017 Inditex realized that it needed to assess options and make critical decisions about the social venture's future. Would it prove wiser to take this program online? Should Inditex carry this scheme to other countries? Did it make more sense to expand further in Spain first? How was the program's actual impact measured? Would it be best to create multi-brand outlets? Many questions filled program heads' minds at this juncture.

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# **Can a Not-For-Profit Radio Station Survive in a Declining Industry with an Inexperienced Manager?**

Jeffrey R. Miller, Sam Houston State University  
Simon Medcalfe, Augusta University

## **Case Objectives and Use**

This case is most appropriate for a not-for-profit course, a strategic management course, or a course in entrepreneurship. The case is appropriate for graduate and upper-level undergraduate students.

In completing this assignment, students should be able to:

1. Identity how the financial statements of a nongovernmental not-for-profit organization differ from a business enterprise
2. Appraise how an inexperienced manager/owner can achieve success
3. Evaluate how an organization can survive and possibly thrive in a declining industry

## **Synopsis**

Clarence Barinowski dreamed of starting a non-profit radio station in Augusta Georgia that would eventually broadcast throughout the Southeast. He had no experience in the radio business and had to keep his full-time job. A prominent local radio manager and others told Clarence that his dream was not achievable. Such opinions of Clarence's chances did not seem to faze him. Clarence saw a need and was determined to solve it. How could Clarence start his radio station? In addition, if he was even able to start such a venture, how was it sustainable in a seemingly declining broadcast radio market?

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# **The Beiteddine Festival: A Budget Gap**

Lina Tannir, American University of Beirut

## **Case Objectives and Use**

The case focuses on financial management practices of non profit/governmental organizations (NGO) and would be useful to illustrate specific topics such as financial planning, sustainability, cost and revenue allocation, budgeting, and other closely related topics. It can be taught in various courses such as, finance, financial statement analysis, event management, and social entrepreneurship.

In this case, students are expected to analyze and understand the mission, cultural impact, and financial statements of NGOs operating in unstable economies, to be able to provide advice on how NGOs can operate and preserve their socioeconomic impact while at the same time being financially sustainable.

Through this case, students would be able to understand the importance of the role NGOs play in development, the type of activities that NGOs engage in, and the developmental impact of NGO work on local economies. Students would also get exposed to cultural and event management issues, learn about the importance of cultural events, and their role in bringing people together. They would in addition understand the importance of having clear objectives and continuously monitoring progress, learn the difference between financial statements of NGOs and those of companies, work with general data relating to financial statement analysis, learn how to develop and forecast a budget, and finally learn to make informed decision based on data, and in light of stated objectives.

## **Synopsis**

There is strong empirical evidence in support of the importance of the role NGOs play in economic and social development. The Beiteddine Art Festival (BAF) is a non profit organization (NGO) that hosts art festivals in Lebanon. In January of every calendar year the head of the Executive Committee of the festival prepares a financial report detailing the activities, revenue sources, and expenditures for the elapsed year to be approved by the administrative committee of the NGO. These reports would be used to solicit sponsors and secure bank loans for the upcoming year's activities. As an NGO, the BAF relied heavily on donated funds and grants to close the gap in its financing needs. The insecurity and instability of its revenues coupled with escalating expenses that were most of the time opportunistic owing to a deteriorating political and security situation in Lebanon, posed a serious threat to the financial sustainability of the BAF.

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# Ozark Natural Foods

David Graham Hyatt  
University of Arkansas

## Case Objectives and Use

This case is well suited for courses in business strategy, social enterprise, business and society, or business and sustainability. The case is particularly well-suited for course in the cooperative form of business, and might be run early in the course to introduce issues in a cooperative grocery and to differentiate cooperatives from other forms of organization. It could also be run later in a similar course where the emphasis would be on cooperative strategy and managerial decision making. As such, the learning objectives may receive differing emphasis.

After working this case, students should be able to:

1. Understand the cooperative form of business
2. Differentiate cooperatives from businesses and social organizations
3. Understand the challenges and opportunities of a purpose-driven organization in a competitive market
4. Recognize duality and paradox in organizational settings
5. Analyze and make a recommendation about cooperative business strategy

## Synopsis

This case considers the view of Mike Anzalone, general manager of the Ozark Natural Foods cooperative (the Co-op) in Fayetteville, Arkansas over periods of growth and decline. Anzalone was hired in 2006 as retail manager, was promoted to store manager, and in 2016 became the general manager. While the Co-op was still recovering from a period of financial distress when Anzalone was hired, he witnessed significant growth over the first 5 years of his tenure. The next five were more challenging, as the Co-op faced competition first from Fresh Market, then from Natural Grocers, and then from Whole Foods Market. The Co-op had responded to intense competition with a strategy that its management called “hunker down” which mainly called for cost reductions, such as staff salary increases.

Although the Co-op had lost about 38% of its sales, it was still competing due to changes in pricing, hunker-down, and other strategies. But in the summer of 2017, the Federal Trade Commission gave the green light to mega online merchant Amazon’s purchase of Whole Foods Market. Now within days of that announcement, the local Whole Foods was cutting prices. How should they guide the store through this new challenge? What unique strengths could the cooperative capitalize on?

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# **Casa Andina Hotels**

PhD. Remy Michael Balarezo Nuñez, Universidad de Piura (UDEP)

PhD. Paul Corcuera Garcia, Universidad de Piura (UDEP)

PhD. Mariela Garcia Rojas, Universidad de Piura (UDEP)

## **Case Objectives and Use**

This case has just been write. It has been construct from personal interviews from the CEO and Vice Presidents of Human Resource, Housing and Strategy of the firm. It has never use in class. The idea the authors have in writing the case are two (but can be improve):

1. To show students and executives how a Peruvian firm can outperform international firms in a very competitive industry (hotel industry). Especially how a new venture can take advantage to stablish strong incumbent firms in the industry.
2. To allow students and executives to think and propose social and nature environment actions and policies in terms of economic value and to introduce them into its business model and generate important advantage. In addition, the case suggests considering the importance of communicating that to the costumers and to the market.

The idea is to use the case in graduate programs, especially the MBA in the Corporate Sustainability course or in the Strategic Management Course.

## **Synopsis**

Casa Andina is a Peruvian hotel chain that in the last 15 years have shown a huge growth and has become an important player in the hotel industry in Peru. It is one of the most important hotel chain in the country. Juancho Stoessel, its CEO, who founded the firm, has seen how his dream came true. Casa Andina has just reached its 15th anniversary. Actually, he changed its hotel brand and introduced a new model to operate new hotels. Despite the entire good job done, Juancho and his executive team have a feeling that something is missing in its strategy.

Therefore, the firm have developed different type of environmental and social practice but they have not been insert in the business strategy. It is a great opportunity for the firm to put in value these actions. In one way, because the firm is list in the Lima stock exchange market and it could be easy to find investors looking for sustainable firms and increase the number of hotels and locations to 2020. Moreover, these actions allow fulfilling its firm purpose: “be the first hotel chain that invite to experiment Peru in all its ways and nuances”, especially being Peru a risky country for climate change.

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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, instructor’s manual, and synopsis were anonymously peer reviewed and accepted by the North American Case Research Association (NACRA) for its annual meeting, October 4-96 2018, Orlando, FL. All rights are reserved to the authors and NACRA. © 2004 by PhDs Remy Michael Balarezo Nuñez, Paul Corcuera Garcia and Mariela Garcia Rojas. Contact person: PhD. Remy Michael Balarezo Nuñez, Universidad de Piura (UDEP), Piura, PE. remy.balarezo@udep.pe

# **Baldor Specialty Foods: The “Sparcs” Challenge**

Michelle DeMoss, Stetson University  
Ram Subramanian, Stetson University

## **Case Objectives and Use**

The case deals with food waste, a key issue in sustainability. It presents this sustainability issue in the form of a strategic challenge. The case would suit a senior level undergraduate or a graduate course in strategic management. In such a course, the case is best taught toward the middle of the semester after students have had exposure to the basic concepts of business-level strategy formulation. The case could also be used in a senior level undergraduate course in marketing strategy to discuss strategic decisions involving brand management and consumer behavior.

After reading and analyzing the case, students should be able to understand what sustainability is and how sustainability challenges interface with the organization’s strategy, examine and articulate the business case for sustainability-based strategic decisions, and analyze the business and non-business factors that are relevant to sustainability initiatives.

## **Synopsis**

Baldor Specialty Foods is a family owned, New York City-based food intermediary that served business customers in the country’s northeast corridor. A key activity that Baldor performed, called the “Fresh Cuts” program, was sourcing and preparing various fruits and vegetables for use by its customers. The Fresh Cuts program generated approximately 150,000 pounds per week of produce trimmings and scraps as a byproduct of processing the produce to sell to restaurants and grocery stores. Thomas McQuillan, Baldor’s Director of Food Service Sales & Sustainability, was charged with the disposal of these scraps in an environmentally friendly way. After McQuillan renamed Baldor’s food scraps as “SparCs,” (“scraps” spelled backwards), he and the company had early success in selling and/or donating SparCs primarily for animal consumption and partly for human use. After SparCs initial success, Baldor had set an ambitious target of 70 percent of food waste designated for human use. However, in 2018, McQuillan realized that Baldor was far behind in reaching this goal with only 10 percent sold for human consumption. This shortfall also had an adverse financial consequence for the company. McQuillan had to come up with a plan to help Baldor achieve its sustainability goal with respect to food scraps.

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# **Laureate Education Inc: Always Meant To B?**

María Ballesteros-Sola, California State University, Channel Islands  
Elizabeth Ontaneda, Universidad Peruana de Ciencias Aplicadas (UPC)

## **Case Objectives and Use**

This case is appropriate for upper-division or graduate-level courses that focus on social business, sustainable business, and corporate social responsibility. Given Laureate's unique characteristics--an industry-leading MNC, Public Benefit Corporation and certified B Corp that would later become publicly traded--the case can also be discussed in a strategy class to facilitate a unique industry analysis as well as to support the discussion on competitive advantage. In a strategy class, the case can be used to introduce the concept of sustainable business that moves away from the debated notion of corporate social responsibility (CSR) toward shared social and business value. It is also worth noting the dearth of cases that address the B Corp certification in general and especially in the setting of an MNC. Given the industry setting--higher education--we anticipate that the case can be used not only in traditional business programs but also in educational leadership programs.

## **Synopsis**

In early 2016 Laureate Education, Inc. was the largest for-profit post-secondary education company in the world with more than one million students enrolled in 88 institutions across 28 countries. In 2015, after much consideration, this multinational corporation (MNC) modified its legal status to become a Public Benefit Corporation (PBC) in Delaware (U.S.) and subsequently completed the certification process to come a certified benefit corporation (B Corp). Laureate filed for its initial public offering in 2015, the same day it became a PBC such that when it went public in February 2017, it became the first publicly traded PBC and largest publicly traded B Corp in the world.

The case presents Laureate's founder and CEO, Doug Becker in early 2016, after reaching all of these critical milestones as he evaluates the long-term value of the certification. Specifically, students must evaluate how are the B Corp certification and PBC legal status helping the organization to fulfill its mission, create social value, manage stakeholder expectations and create or maintain a competitive advantage within the context of soon to be a publicly traded company.

To do so, the case describes Doug Becker's entrepreneurial background, Laureate's history and key developments up to early 2016. The case highlights key points in the evolution of the for-profit higher education industry from the late nineties through 2015, as well as an introduction to the B Corp certification and its unique Higher Education Addendum. The case also clarifies the difference between the B Corp certification and the legal statute of the same name adopted in 33 states in the U.S. and Italy.

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# **Paw Works: From Shelters To “Furever” Homes”**

Maria Ballesteros -Sola, California State University, Channel Islands  
Danette Wilcox, California State University, Channel Islands  
Rose Sutton, California State University, Channel Islands  
Briana Ramos, California State University, Channel Islands

## **Case Objectives and Use**

The case is best suited for undergraduate Social Entrepreneurship and Nonprofit Leadership Management. The case describes a growing phenomenon in the Third Sector. As nonprofits look for alternative sources of funding, they are turning their attention to market based solutions to achieve their mission and organizational goals. This case encourages students to analyze the advantages and disadvantages of establishing a social enterprise in the context of a nonprofit organization.

Students that properly prepared and discuss this case should be able to:

- Analyze the social problem presented in the case, this is overpopulated shelters.
- Identify, compare and contrast nonprofits’ traditional and non-traditional sources of funding.
- Analyze advantages and disadvantages of pursuing an earned income strategy in the context of a non-profit organization.
- Apply the Social Business Model Canvas to analyze and develop a social enterprise idea.

## **Synopsis**

This real and undisguised case is based on Paw Works, a 501(c) 3 founded in January 2014 in Ventura County, California. The Paw Works’ mission is to "end the senseless killing of healthy, adoptable animals through education that promotes responsible pet ownership." The case follows the decision-making process by Paw Works' co-founders, Morgan and Atkins, in mid 2014 regarding whether or not opening an upscale retail space to encourage and facilitate the pet adoption process as well as to generate additional and sustainable sources of income through the sales of pet supplies. Traditionally, non-profit rescue organizations have relied on sporadic adoption events, grants and donations as the main sources of funding. However, in mid 2014 Morgan and Atkins considered the possibility of opening a pet adoption center in a high-end shopping mall in Thousand Oaks, California. The case describes the founders’ and nonprofit’s background, the legislation surrounding “No-Kill” shelters, the pet supplies industry as well as the options to achieve a more sustainable source of funding.

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# STRATEGY AND POLICY CASES

Cases	Authors
Lions Eye Institute at the Crossroads	Aharon Yoki Janice Grogan
SeniorVu: Designing our B2C Strategy to Support our B2B Clients	Marilyn Taylor Jeanie Latz Ramon Genoa Theresa Coates
Whither our Parents in their Post-Retirement Years? An Industry Note on the U.S. Senior Care and Living Arrangements Industry Segments	Marilyn Taylor Theresa Coates
AMC Networks Inc: “The Walking Dead” Problem	Ram Subramanian
Little Short Stop	Meredith Woodwark Karin Schnarr
Strategy Grouping of SD Winery: Be Different or Strategic Alignment	Marc Dressler
Eastern College: Conserving an Institution	Brian Gilliam
A New Horizon	Jaime Hodges
Vista Outdoor: A Business Portfolio Under Stress	John Lawrence
The ‘Useless’ Case: Defining Competition – It’s Kind of a Gray Area	Thomas Fisher
Athena Software: Vision 2020	Lisa Giguere
India Post: In Search of an Identity	Vaishali Garg
IoT Gamification at McDonald’s Japan with Pokemon GO	Jorge Calvo Lourdes Urriolagoitia

# **Lions Eye Institute at The Crossroads**

Aharon Yoki, University of South Florida

## **Case Objectives and Use**

The LEITR eye bank discussion case would be primarily appropriate for an MBA strategy or MBA capstone course and secondarily for an MBA accounting class or a cost accounting course in a Masters of Accountancy program.

## **Synopsis**

The Lions Eye Institute for Transplant and Research (“LEITR”), a nonprofit “eye bank” in Tampa, Florida has experienced several years of financial losses following the loss of recovery operations in Central Florida after the end of a cooperative agreement with another tissue recovery organization (TBI). LEITR’s board is asking management to present a plan to stabilize the losses and put LEITR back on a path to growth.

Management is considering several potential options including aggressively pursuing a return to the Central Florida marketplace, reducing operating size and workforce, merging with another similar organization, and continuing to draw from the sizable investment portfolio to support operations while continue to serve the surgeon customers and serve the LEITR mission to restore eyesight.

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# **SeniorVu: Designing our B2C Strategy to Support our B2B Clients**

Marilyn L. Taylor, Jeanie Latz, and Ramon Perez, University of Missouri at Kansas City  
Theresa Coates, Limestone College  
V.J. Narapareddy, University of Denver

## **Case Objectives and Use**

This author developed the SeniorVu case to be used in capstone courses at the undergraduate and graduate levels. The case alone may be used mid-way through a semester after concepts in analysis of the internal and external environments have been covered. Alternately, it may be used in conjunction with the industry note, Whither our Parents in their Post-Retirement Years? An Industry Note on the U.S. Senior Care and Living Arrangements Industry Segments. The industry note overviews the segments of the elderly care industry that the company aims to serve. When used in conjunction with the industry note, the combined set of materials provides a comprehensive end-of-semester assignment. The case provides the student opportunity to apply concepts in internal and external environment analysis as well as design of strategy. A unique aspect of the case is that it focuses on design of a B2C strategy for a company that is successfully pursuing a B2B strategy.

## **Synopsis**

This company case focuses on SeniorVu, a B2B internet-marketing company in early 2018. The nearly two-year old company has made significant strides in serving various companies in the elderly residential care industry. However, the three senior executives feel the need to develop a B2C strategy that would meet the needs of those looking for appropriate elderly care options.

The case provides the history of SeniorVu, an overview of its operations, background on the three senior executives, a synopsis of the parent company SoftVu, and a summary of the SoftVu's current challenges. Exhibits provide information on additional SeniorVu senior managers, a synopsis of other internet-based elderly care referral services, SeniorVu's financials, and identification of Senior Vu's strategic partners. Appendix A provides a synopsis of selected customer companies. Appendix B provides information on the CAN-SPAM Act of 2003.

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# **Whither our Parents in their Post-Retirement Years? An Industry Note on the U.S. Senior Care and Living Arrangements Industry Segments**

Marilyn L. Taylor, University of Missouri at Kansas City  
V.J. Narapareddy, University of Denver  
Theresa Coates, Limestone College

## **Case Objectives and Use**

The purpose of this industry note is to provide background information on an important and rapidly growing market, i.e., elderly care. The industry note provides students with the opportunity to apply industry-level analysis concepts to this highly fragmented set of industry segments. Specifically the assignment questions provide students with opportunity to assess demand trends; undertake a preliminary examination of the barriers to entering the industry; apply the classic PEST (or variations such as PEST+G, PESTE, PESTLE) framework to the industry; apply the classic Five Forces analysis; assess the segments for potential investment given the PEST and Five Forces analyses; design a strategy for an Internet-based company to serve the elderly care industry; migrate the learning from the industry note into one's personal decision-making sphere.

The industry note (and accompanying case) are targeted for capstone courses at the undergraduate and graduate levels. These courses are usually called Strategic Management or some variation thereof.

## **Synopsis**

This industry note covers various aspects of in-home care for independent living, assisted living facilities, continuing care retirement communities, nursing homes and hospice in early 2018. The note discusses the U.S. demographic trends that are a primary driver of the various industry segments. In addition, it provide insights into the dynamics of decision-making by the elderly person or a caregiver who is trying to help made needed arrangements. Sections overview other factors that impact the industry including accreditation and regulations, immigration policy, minimum wage policy, Medicaid and Medicare, Medicare and Medicaid Fraud, technology, technology developments, and the state of the long-term care insurance industry. Finally, the note outlines some of the marketing efforts by and for the industry.

The authors initially developed the industry note as background material for the April 2018 Ninth Annual UMKC/Bloch Case Competition program. The authors drew materials for the Note primarily from publicly available data on demographics, government regulations, the industry segments and companies.

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The authors developed this industry note for class discussion rather than to illustrate either effective or ineffective handling of situations. The case and teaching note were anonymously peer reviewed for presentation at the NACRA 2018 Conference, Orlando, FL, October 4-6, 2018. © by authors. Contact person: Marilyn L. Taylor, Gottlieb/Missouri Chair of Strategic Management, Henry W. Bloch School of Management, BHH210, 5110 Cherry, University of Missouri at Kansas City, Kansas City, MO 64110 Ph. 816-235-5774 [taylorm@umkc.edu](mailto:taylorm@umkc.edu)



# AMC Networks, Inc.: “*The Walking Dead*” Problem

Ram Subramanian, Stetson University

## Case Objectives and Use

This is a case involving vertical integration, a topic that is taught in a strategic management course at both the undergraduate and MBA levels. The case best fits such a course. Since vertical integration, a corporate (rather than a business) strategy topic is usually taught in the second half of the course, this case is best positioned after the class is familiar with the topic and the related concepts of firm boundary and transaction cost theory.

After analyzing the case, students should be able to:

- Assess the pros and cons of a vertical integration strategy
- Understand how vertical integration works in the television industry
- Identify the tradeoffs between the economic benefits of vertical integration and the costs of conflict of interest

## Synopsis

In August 2017, AMC Networks, Inc. (AMCN), a New York City-based cable television provider faced a lawsuit from the creative talent behind their hit show, *The Walking Dead*. The lawsuit charged that AMCN used its vertical integration into content development to reduce the profits available for distribution to participants. The lawsuit came on the heels of an earlier unresolved lawsuit involving the profits of the same show. For AMCN, a content distributor, expanding into content creation through its AMC Studios had a number of benefits. However, the advent of streaming players such as Netflix, Hulu, and Amazon Prime and an industry-wide shift among cable networks to offer proprietary content as a way to brand and distinguish themselves from the competition had an impact on the relationship between the business and the creative side of the industry. AMCN’s CEO, Joshua W. Sapan and his team had to decide on how they were going to handle the legal and the business fallout of the lawsuit.

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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 the NACRA 2018 Conference, Orlando, Florida, October 4-6, 2018. © 2018 by Ram Subramanian. Contact Person: Ram Subramanian, School of Business Administration, Stetson University, DeLand, Florida 32723. [rsubram1@stetson.edu](mailto:rsubram1@stetson.edu)

# **Little Short Stop: Competing in a Shifting Industry**

Meredith Woodwark, Wilfrid Laurier University  
Karin Schnarr, Wilfrid Laurier University

## **Case Objectives and Use**

This case would be most appropriate for capstone courses in strategic/general management for undergraduate students. It would also be highly applicable for specialized business courses in small business management. The objectives of the case are that students will be able to do the following:

- Identify the challenges associated with operating small, privately held family firms.
- Identify and assess the company's strategy and current performance. The focus will be determining whether the existing strategy is aligned with the internal and external environment.
- Develop strategies to continue the survival of a small family business while honoring the management preferences of the family shareholders.
- Understand the strategic impact of government policy changes on small businesses.
- Determine opportunities for strategic action for the company over the next two years. Through this analysis, students will gain a stronger appreciation for the challenges facing small, family owned and operated businesses.

## **Synopsis**

A chain of local, privately-held convenience stores in southwestern Ontario, Little Short Stop (LSS), is projecting a loss in 2018 and 2019 because of an increase in the provincially mandated minimum wage from \$11.40 in late 2016 to \$15.00 within the space of three years. Prior to this change, LSS had been exceeding the average industry growth rate of five percent for the past five years. General Manager Gerry Bes must determine how to respond to mitigate the revenue loss and to ensure the company is competitive going forward. As operations are already lean and the external environment extremely competitive, the focus must be on increasing revenues. The company is further constrained because of its revenue mix; two-thirds of revenue consists of restricted products like tobacco and lottery tickets where prices are set by regulatory bodies. While Bes is open to considering all options, he is constrained by strong management preferences of the privately held family firm, including not expanding beyond the geographic boundaries of Waterloo-Wellington and not incurring any long-term debt. This live case presents a set of external and internal issues for students to consider which are dramatically impacting the fifty-year-old family firm and its survival.

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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 2018 Conference, October 4-6, 2018, Orlando, FL. ©2018 by Meredith Woodwark and Karin Schnarr. Contact person: Meredith Woodwark, Wilfrid Laurier University, Waterloo, ON, [mwoodwark@wlu.ca](mailto:mwoodwark@wlu.ca).

# Strategic Grouping of SD Winery: Be Different Or Strategic Alignment?

Marc Dressler, University of Ludwigshafen

## Case objectives and use

The case insemminates courses to explore strategic positioning, preferably on a Master course level. It encompasses entrepreneurial management and strategic grouping. Two central questions in strategic management can be explored:

1. Strategic grouping (e.g. generic strategy)?
2. Positioning far or close to competitors?

Besides an evaluation of strategic options, the instructor can use the case to discuss strategic repositioning in the light of organizational change. Key words therefore are “resistance to change” and “brand awareness of existing customers”. The case illustrates the risks of customer losses in case of a more radical change, as experienced by Daniel winery in the presented strategic transformation but also the entrepreneurial rewards (realizing vision and ambition). The case furthermore serves to illustrate the management of handing over companies from one to the following generation. Students need to be acquainted with the basics of strategic and marketing management.

## Synopsis

The case describes a transitional strategic reorientation of a small enterprise - a German winery located in a premium wine region with longstanding wine tradition – from 2002 until 2018. Data stems from a multi-case research on sustainable strategies. In the increasingly competitive wine environment with massive environmental and consumer changes, a winning strategy is imperative. Wineries and generally SME’s managerial focus is on products and often the companies are strategically stuck in the middle. The crowding out in the industry requires a convincing strategic profiling.

Stephan Daniel, the owner and manager of the winery, transformed a small, underinvested, and traditional winery without strategic profile into a niche player successfully targeting LOHAS. In the course of this transition since 2002, he lost the ancient customer base. The transition required investments increasing his debts putting a strain on the economic sustainability of the winery. Stephan managed to grow and to create a product range with an according brand base. He was satisfied to have successfully realized his entrepreneurial ambitions. Comparing his performance with a premium wine estate in the course of a research benchmarking on sustainability made him wonder, whether it is time to readjust his strategy. The colleague winery emphasized the potential value generation of a distinctive strategic profiling but positioning close to the competitors within the strategic grouping of premium wineries. A strategic alternative is to continue the path of distinction with more focus on sustainability. The case addresses the strategic trade-off between closeness to competitors to profit e.g. of price positioning or synergies versus maximizing the distance to secure distinctiveness but limiting legacy and a need for constant innovation.

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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 underlying project has been financed by German federal ministry for Education and Research. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2018 Conference, Orlando, FL, October 4-6, 2018. © 2018 by Marc Dressler. Contact person: Marc Dressler, University of Ludwigshafen, Ernst-Boehe Str. 4, D-67059 Ludwigshafen, 0049-6321-671546, mdressler@hs-lu.de.

# **Eastern College: Conserving an Institution**

Brian Gilliam, University of South Florida (student author)

Janis Gogan (faculty supervisor)

Matthew Mullarkey (faculty supervisor)

## **Case Objective and Use**

Industry: Higher Education

Data Sources: Interviews, survey, organization web site, consultant reports, internal documents

Target courses: Organizational Leadership, Strategic Management, Educational Leadership

Case learning objectives: This disguised case is designed for graduate and executive students in management and educational leadership programs. The focus of this case is on how small mission-driven non-profit organizations maintain mission while adapting to variable and unpredictable revenue streams in the context of increasing competitive forces while serving interests of stakeholders.

Case issues: Viability and sustainability of non-profit educational organizations in increasingly competitive marketplace for services. Leadership, retrenchment and growth strategy dynamics are involved in operating decisions with impact on strategy and mission. Financial management impact on strategy, mission, and operations.

Relevant theory or managerial frameworks: Stakeholder theory, Institutional theory, and organizational adaptation. Strategic planning, financial management, capital planning and budgeting, organizational leadership, organizational behavior, organizational priorities, resource allocation.

## **Synopsis**

The president of a small, private, non-profit religious organization is faced with a \$1.5 million projected annual budget deficit in December 2017 resulting from an enrollment decline that has become a trend over the past two years. During an aggressive capital campaign to build and improve facilities, internal conflict arising from operating priorities and resource allocation, and external forces causing the institution to wrestle with how it preserves its legacy and future, the protagonist is preparing for a board meeting to present a plan for balancing the budget in February 2018.

The key decisions in the case involve revenue growth strategies, cost reduction alternatives, and capital planning choices. It presents complexity and interrelated dimensions where interests of stakeholders, institutional value proposition, and organizational values intersect in a context that will influence the future of the institution.

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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 2018 Conference, Orlando, FL, October 4-6, 2018. © 2018 by Brian Gilliam. Contact person: Brian Gilliam, University of South Florida, 4202 E. Fowler Ave., Tampa, FL 33620, 714.745.9479, [bjgilliam@mail.usf.edu](mailto:bjgilliam@mail.usf.edu).

# **A New Horizon**

Jaime Hodges, University of South Florida  
Janis Gogan (faculty supervisor)

## **Case Objectives**

This case is primarily designed for an Undergraduate or Graduate course in Organization Behavior, Strategic Management or Leadership to help emphasize the importance of organizational structure and culture in strategic decision making. Students will integrate the knowledge gained in earlier core courses in the business school curriculum, illustrating how pieces of the business puzzle fit together, and demonstrating why the different parts of a business need to be managed in strategic harmony for the organization to operate successfully.

The objectives of this case are for students to:

- Recognize culture as a driver of financial performance and a component of corporate strategy
- Understand the impact of organizational & management structures
- Apply systematic methods for managing change

## **Synopsis**

Dr. Dale Cotis (CEO) and Mary Ranes (President) have recognized a need to implement a new strategy in their market research (MR) consultancy business – Horizon Research – after the 2015 year-end financials show yet another year of stagnant top line growth. Upon undergoing a valuation exercise to help guide their exit strategy of eventually selling the privately-held company, the co-owners have determined a two-pronged plan: (1) growth via strategic acquisitions, enabling them to acquire new techniques and technologies and (2) organic growth through the “product-ization” of current core competency offerings and intellectual property. To achieve their growth goals, Dale and Mary recognize a need to change some of the “ways of working” within Horizon given sub-par performance on new business wins in one of their core areas – Ad and Brand Tracking, as well ensuring success of their recent acquisition in the Customer Experience (CX) space.

Horizon’s organizational structure reflects the company’s strong internal culture which focuses on employee empowerment and autonomy, a balanced employee lifestyle and a very customer-focused orientation. Dale and Mary are aware that change within their organization is likely to be met with a fair amount of resistance and considered this before making a move. However, after a failed attempt to subtly introduce new organizational dynamics within Horizon, Dale and Mary are faced with a “what now?” decision. They feel confident in where they need to go, but the problem is “how do they get there?”

The disguised case based on real events provides ample material on both internal (organizational structure, culture, management style) and external (MR industry, competitive landscape) dimensions for discussing the importance of these aspects in implementing a new strategy and managing change.

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# Vista Outdoor: A Business Portfolio Under Stress

John Lawrence, University of Idaho

## Case Objectives and Use

This case was written for use in the corporate strategy portion of a strategic management course at either the undergraduate or graduate level. It could also be used in a crisis communications course. After reading and discussing the case, students should be able to: (1) better understand when and how related diversification can produce competitive advantage and enhance shareholder value, (2) use stakeholder analysis as an input to making portfolio management decisions, (3) recognize the risks that exist in building a product/brand/business portfolio when customers across the portfolio have very different perspective on what being a responsible corporate citizen looks like, and (4) formulate a reasonable response to a corporate crisis using best practice from the crisis communications literature.

## Synopsis

This case focuses on Vista Outdoor Inc., a publicly traded outdoor sports and recreation company with just over \$2 billion in annual revenues. In 2015, when the company was spun off from aerospace and defense contractor ATK, the company primarily competed in the Shooting Sports market with brands like Savage Arms (firearms) and Premium Federal, CCI and Speer (ammunition). In 2015 and 2016 the company spent over \$900 million on acquisitions to bolster the Outdoor Products side of its business, adding CamelBak (hydration systems), Bell (cycling helmets), Giro (cycling and winter sports helmets), Jimmy Styks (stand up paddle boards) and Camp Chef (outdoor cooking systems). But weak performance resulted in the initiation of a comprehensive strategic review of the company's business portfolio in November of 2017.

This review was ongoing when a 19 year old former student entered Marjory Stoneman Douglas High School in Parkland, Florida with a semi-automatic AR-15 style rifle and killed 14 students and three educators on February 14, 2018. Surviving students at the school rallied the nation, and 8 days later large companies like Enterprise, Hertz, Delta and United Airlines started severing ties with the National Rifle Association. Dick's Sporting Goods, Walmart and other retailers soon announced changes to their policies on selling guns, increasing the required age for purchase to 21 and in some instances deciding to no longer sell semi-automatic AR-15 style rifles (what the trade calls modern sporting rifles). Then on March 1, in response to customer petitions, both Recreational Equipment Inc. (REI) and Mountain Equipment Co-op (MEC) announced they would stop ordering and stocking Vista Outdoor brands like CamelBak, Bell and Giro because the company also manufactured guns (including semi-automatic, AR-15 style rifles similar to the one used in the Parkland shooting) and because they didn't believe the company was doing enough to advance the national conversation on responsible gun ownership. As the case concludes, students are put in the shoes of Vista Outdoor CEO Chris Metz who must decide how to respond to the actions taken by its retailers, as well as to consider whether the current national debate about guns and gun control should be factored into the ongoing strategic review of the company's business portfolio.

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# The ‘Useless’ Case: Defining Competition in The Gray Zone

Thomas S. Fisher, University of South Florida, under the supervision of  
Dr. Janis L. Gogan, Bentley University and Dr. Matthew Mullarkey, University of South Florida

## Case Objectives and Use

This case can be used in a graduate class for Business Management, Strategy or Decision Sciences courses or a seminar for doctoral students (as they explore real-world issues from the perspective of a scholar-practitioner). It may also be used at the Graduate level for any of the Defense Department’s five advanced warfighting schools or respective War Colleges. The objectives are:

- Explore the nature of problems, particularly the concept of ‘wicked problems’, and the difficulty of framing a problem due to the challenges of increasing complexity.
- Understand the differences between cooperation, coopetition, competition and conflict/coercion.
- Examine the relationships between Corporate Policy – Strategy – Resources (or Ends – Ways – Means for a military college) and how to exploit the associated differences and dilemmas to develop effective competitive approaches.

## Synopsis

Lieutenant Colonel Kris Faught, a U.S. Marine Corps helicopter pilot with multiple combat tours, was known to the military aviation community by his call sign: ‘Useless’. Useless was assigned as a lead planner at the U.S. Central Command. The 4-star general in charge of U.S. Central Command gave Useless the task of determining how to use military resources under his command to compete with adversaries in a space between peace and war that he called the ‘Gray Zone’. Other competitors such as Russia, China and Iran were conducting various military actions short of war to achieve their national objectives at the expense of the U.S. Useless had to answer several questions that emerged during his analysis. What is the nature of ‘competition’ and how does it differ from normal military ‘combat’? What types of competitive approaches are there, and what does a successful competitive campaign actually achieve? How would one even recognize success and, if so, how can success be measured? It is a complicated topic; many issues had to be addressed if the resultant activities designed to thwart an adversary’s efforts in the competitive space were to protect U.S. interests but avoid an escalation of military actions that could lead to another war in the Middle East. In short, Lt Col Faught had to define a complex problem, develop corresponding approaches for the Department to compete and succeed in this ‘Gray Zone,’ but ensure this military activity did not move beyond competition and in to conflict.

This case set in 2018 explores the concepts of complexity and uncertainty associated with particularly ‘wicked’ problems that affect strategic decision-making. It also explores the *Nature of Competition* including the associated concepts of coopetition, multipoint competition and the strategic concepts of corporate policy and its relationship to corporate strategy and resources. The case examines the efforts of military planners as they attempt to define an emerging complex problem that results in changes to the strategic environment along with their efforts to develop potential solutions for this emerging problem as a venue for exploring the construct of Competition in a broader, more general, and largely undefined theory of the *Nature of Competition*.

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The opinions, conclusions and recommendations expressed or implied within this case are solely those of the author and do not necessarily represent the views of the Department of Defense or any other Department or Agency of the U.S. Government. 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 4-6, 2018, Orlando, FL. All rights are reserved to the authors and NACRA. © 2018 by Thomas S. Fisher. Contact person: Thomas Fisher, University of South Florida, Tampa, FL. fishert@mail.usf.edu

# Athena Software: Vision 2020

Lisa Giguere, Wilfrid Laurier University

## Case Objectives and Use

This case is recommended for use at the upper undergraduate or MBA level in an introductory strategic management course. The objectives are to:

- Organize and evaluate data to assess company performance.
- Understand the relationship between value proposition and competitive advantage.
- Evaluate and develop corporate strategy using the Diamond-E framework.
- Determine an appropriate company valuation and make a sell decision.

## Synopsis

In June 2018, Geoff Bellew, CEO, Athena Software was re-evaluating the strategic direction for the Waterloo, Ontario, Canada based software as a service (SaaS) business. Athena Software developed and marketed case management software for social services and healthcare industries. By June 2018, Athena Software's monthly recurring revenues had reached \$600,000, with 313 active customers in 30 verticals across 5 continents and 15 countries.

Athena Software had been founded in 2001 by Greg Stanley, Dianne Stanley-Horn and Kevin Stanley and enjoyed rapid growth over the years. Although the three co-founders had social service industry experience, they had little to no business expertise. By early 2017, company growth had begun to plateau and the co-founders realized they needed a new plan to continue to scale the company. In July 2017, the co-founders hired Geoff Bellew as CEO. With over 40 years of experience as a senior executive in financial services and technology sectors, Bellew was tasked with leading the company.

For the first time in the company's history, Bellew had initiated a formal strategic planning exercise resulting in Vision 2020. Although the goals were aggressive, Bellew was determined to reach the targets.

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The author developed this case based on actual events, for class discussion rather than to illustrate either effective or ineffective handling of the situation. Unless otherwise stated, all figures have been expressed in Canadian dollars. For confidentiality purposes, some figures have been disguised or adjusted. The author is grateful for the cooperation and support of Athena Software, particularly Jordan Fox, Director of Sales. 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 4-6, 2018, Orlando, FL. All rights are reserved to the author and NACRA. © 2018 by Lisa Giguere. Contact person: Lisa Giguere, Wilfrid Laurier University, Ontario, Canada. [lgiguere@wlu.ca](mailto:lgiguere@wlu.ca)



# **India Post: In search of an identity (A)**

Vaishali Garg (Student Author), Indian Institute of Management (Indore)  
Abhishek Mishra (Faculty Supervisor), Indian Institute of Management (Indore)

## **Case Objectives and Use**

The case can be used in a graduate or a post graduate class in courses like strategy, public policy, brand management, organization development. At the end of the case student should learn the concept of Organization Evolution, Brand Revitalization Strategies and Rebranding Strategies. The case can be used as an exemplar of implementation of rebranding strategies.

## **Synopsis**

India Post is the world's largest and oldest postal network. In India post offices are not just channels of communication but they are seen as a common men's 'window to the world'. India post connects economically, socially and geographically divided India together. They are rightly said to be the great engines of social development in India.

However recent developments in information and communication technology along with the opening of Indian economy have put Indian postal institution on a weak footing. Present day India Post is a deficit marred organization which is struggling hard to gain back its lost glory. This case unravels various rebranding initiatives of India Post to get a more desirable image for the organization. The initiatives of India post can be classified into three kinds. Firstly India post is trying to modernize its counter and back end operations by using technology. Secondly it is trying to improvise quality of its services and products to get a unified brand identity of a modern institution. And lastly, taking into account the declining mail traffic globally, India Post is planning to diversify itself into other business for example banking, logistics, e commerce etc.

The case is written in two parts. The part A of the case introduces the reader to the 160 year old organization and discusses the manner in which the first two initiatives are rolled out in India Post. While part B of the case takes readers through the diversification initiatives of India Post.

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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 2018 Conference, Orlando, FL, October 4-6, 2018. © 2018 by [Vaishali Garg and Abhishek Mishra]. Contact person: [Vaishali Garg, Indian Institute of Management, Indore, 91-731-2439666, f14vaishalig@iimidr.ac.in]

# IoT Gamification at McDonald's Japan with Pokémon GO

Jorge Calvo, GLOBIS University Graduate School of Management, Tokyo, Japan  
Lourdes Urriolagoitia, ESADE Business School, Barcelona, Spain

## Case Objectives and Use

This case has been taught in executive MBA and Full Time MBA programs to illustrate how Internet of Things (IoT) - enabled technologies are revolutionizing business strategies. It could be used in undergraduate and executive education programs whose participants are already familiarized with corporate and business strategies.

### Research Methodology

To develop the case, one of the authors interviewed the Chief Marketing Officer to understand his vision and McDonald's Japan marketing strategy behind the project as well as used different secondary sources to quantify the scope. We had also the collaboration on the research from the CEO and the Senior Director of Human Resources of McDonald's Japan.

## Synopsis

This business case introduces the gamification campaign launched by McDonald's Japan in July 2016, using the new smartphone version of the popular game Pokémon GO, whose extraordinary success attracted the attention of social platforms, businesses, and academic audiences. The alliance between McDonald's Japan and Niantic-Pokémon is a good example of the social impact of modern games based on geolocation and augmented reality, and how this can embody new business models and marketing strategies. For McDonald's Japan, this alliance attracted a large number of new consumers to its restaurants at a trivial cost, but it involved managing with agility the challenges and inherent risks.

The results for the company were immediate and significant, driven by the community of 3.4 million game subscribers in Japan: it received 1.5 to 2 million daily visits across its 3,000 locations, had an estimated sales increase of 22%, and earned an increase in market capitalization of 9.8%. This marketing strategy connected the underlying culture of the former players of the first Pokémon GO for Nintendo DS with the values of the McDonald's brand, attracting to the restaurants a new segment of customers aged from their mid-30s to their 40s as well as their children. This business case summarizes the change leadership and management in VUCA environments (volatility, uncertainty, complexity and ambiguity) through a strategy of gamification, quantifies the results and analyzes their implications.

Even the immediate results exceeded all expectations, one of the new Chief Marketing Officer's major concerns was the project's sustainability. Given the dynamic nature of gaming, Pokémon GO may or may not be relevant in the next few years. As such, it was key to assess the short-term versus the long-term benefits and the major risks involved in the Pokémon GO gamification project and the potential negative outcomes for the business. This assessment would allow him also to determine the future actions of the strategic alliance between McDonald's and Niantic, the Pokémon developers and hence, change the course of the company's marketing strategy.

### Opening question

Niantic announces the upcoming release of its next big game 'Harry Potter: Wizards Unite' (See Exhibit #4), and proposes to McDonald's Japan the option of sponsoring locations and events of the new game with the same conditions as Pokémon GO. What would you recommend McDonald's Japan to do next?

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