North American Case Research Association

54th Annual Conference

Victoria, British Columbia

October 17-19, 2013

Conference Proceedings

NACRA 2013

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NACRA 2013 Proceedings

Pre-conference draft as of Oct 1, 2013

Note:

Post-conference Proceedings contents will reflect whether at least one author of each case attended the conference.

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NACRA 2013

Research in Progress (RIP) Workshop

Thursday October 17, Noon to 4:00 p.m.
Buckingham and St. James
(Lobby Lower Level, LL)

Track Chairs
Randall Harris, California State University - Stanislaus
Susan Sieloff, Northeastern University

This session is designed to give new and aspiring case writers a deeper understanding of case research and writing. Topics focus on the process of case research, including managing your site location, background interviews and research in the field, and preparing to submit your work to conferences, textbooks and journals.

Mentors

Mentors are experienced case writers who advise authors of RIP case-lets regarding how to move forward from an interesting case idea and initial thoughts about the case learning objectives and an applicable theoretical foundation, to a publishable case and useful instructor's manual.

We gratefully acknowledge the insights and assistance provided by this year's RIP mentors:

Bambi Douma, University of Montana	bambi.douma@business.umt.edu
John Lawrence, University of Idaho	jjl@uidaho.edu
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NACRA 2013 Research in Progress Workshop

Thursday October 17, Noon to 4 p.m.
Buckingham and St James, Lower Lobby (LL)

Author/s	Case Title
Bulocher, Veronique Ruaud, Sabine	Can Branded Retail be the Next Extension/ Distribution Strategy for Bonduelle?
Brennan, David P	Target Explores its Global Expansion Alternatives
Brown, Jodi Constantine	Staff, Volunteers or Patrons First? The Ethics of Food Pantry Use
Chassaigne, Jean	Cas Parfums de Luxe « Vernon-Springs»
Ferguson, Jeffery McNulty, Peggy Gonzalez-Padron, Tracy	How can Social Enterprises Compete in Electronic Recycling?
George, Daniel	Garmin: Which Way Forward?
Goss, Benjamin P DeMoss, Michelle	Women United Football Club
Kamath, Shyam J Lee, Yung-Jae Subrahmanyan, Saroja Zhang. Xiaotian Tina	Ziquita Healthcare Services Ltd.: Robin Hood Provision of Affordable Healthcare for the Poor
Quinlan-Wilder, Tia Johnson, Carol	Selling for K&N Storage: Can I Take those Stinky Tires for You?
Rixon, Daphne	Rowe Family Winery
Uhlenbruck, Klaus Douma, Bambi Kappus, Julian	International Expansion of Hochland SE: The World of Cheese
Wagner-Marsh, Fraya Newell, Stephanie E Sun, Chao	The Future of Dadi LLC
Wei, William Howard, Kimberley Nie, Kaijin	Yifang Digital
Zidulka, Amy.	Fewer Cars on Campus

Plenary Session

Management: Theory and Practice, and Cases

Richard L. Nolan

William Barclay Harding Professor of Business Administration, Emeritus
Harvard Business School

Professor Emeritus of Management and Organization
Foster School of Business, University of Washington

Thursday 5:00 to 6:00 p.m.

Professor Nolan's paper is provided on pages 106-112 of this NACRA 2013 *Proceedings*

NACRA 2013

New Views Presentations and Panels
Friday Afternoon, Oct 18

1:30 – 2:00 Building Theory from Teaching Cases Craigdarroch
Anne Lawrence, San Jose State University

Dr. Lawrence takes attendees through an inductive process by which she used 24 teaching cases from prestigious outlets as the basis for the construction of a typology of management strategies.

1:30 – 2:00 360° Organizational Analysis: A New Paradigm Buckingham

Carol Cumber, South Dakota State University
Joseph Kavanaugh, Sam Houston State University

The NACRA-funded research project in 360 ^{o} Organizational Analysis yielded knowledge on two dimensions discussed in this session: how to manage a comprehensive team-based case research program; and value-added benefits of a multi-disciplinary collection of cases written about one company in the same time frame.

2:15 – 3:15 "New" Uses for the Industry Note Craigdarroch

Bambi Douma, University of Montana
Armand Gilinsky, Sonoma State University
Randy Harris, California State University, Stanislaus

Panelists discuss traditional uses of industry notes and attempt to explain their gradual decline in publication and in the classroom. Next, panelists discuss "new" uses for the industry note for teaching with cases and for student case writing assignments. Panelists also discuss special organizational forms that defy easy categorization, such as non-profits, B-corps, and cooperatives, and describe how industry notes can address such non-traditional forms.

2:15 – 3:15 Innovative Online Case Teaching Ivy Ballroom
Chair: Charles Krusekopf, Royal Roads University
Faculty affiliated with Royal Roads University -- discuss innovations in case-based online instruction.
Jean Slick, *Using Wiki's as Collaborative Technology for Case Studies*
Eileen Pepler, *Develop Online Simulations to Teach Business/Operations Management*
Amy Zidulka, *Using Live Cases in an Online Creativity and Innovation Course*

3:00 – 4:00 A Case Competition for Every Student Buckingham

Rebecca Grant, Peter B. Gustavson School of Business, University of Victoria

The Gustavson School of Business runs a unique annual case competition; every third year B Com student competes. Underwritten by RBC Bank, it is a 3-stage ladder competition. Teams compete over the course of an entire term, culminating in cash awards to winners. This session describes how the competition was designed and implemented, involving 240 students, 80 judges, and 130 volunteers. A Gustavson student competitor shares insights.

3:30 – 5:30 Writing Publishable Teaching Cases Ivy Ballroom

Bill and Peggy Naumes, University of New Hampshire

NACRA 2013

Case Roundtable Track Chairs

Accounting, Finance and Economics
Jeff Michelman, University of North Florida

Behaving
Katherine Breward, University of Winnipeg

Cases Written in French
Ronald Kamin, ISC Paris
Sabine Ruaud, EDHEC

Cases Written in Spanish
Jorge Gonzalez, ITESM

Corporate Governance and Ethics
Marlene Reed, Baylor University
Tupper Cawsey, Wilfrid Laurier University

Entrepreneurship/Small Business/Family Business
Chris Cassidy, Sam Houston State University
Francine Schlosser, University of Windsor

Marketing and Managing Here and Abroad
Javier Silva, IAE Business School
Josep Franch, ESADE

Processes, Projects and Technologies
Javier Busquets, ESADE
Joan Ramon Mallart, ESADE

Social Enterprise and Social Responsibility
Elissa Grossman, University of Southern California

Strategy and Policy
John Gamble, University of Southern Alabama
Gina Grandy, Mount Allison University

Accounting, Finance and Economics

Track Chair:
Jeff Michelman, University of North Florida

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	Gilinsky, Armand, Jr, Finney, Kimberly, Lopez, Raymond H. Richardson, Shaun D.	The Bid to Purchase Rara Avis Vineyards: Has this Bird Flown?
	Gujarathi, Mahendra.	Diamond Foods, Inc.: Anatomy and Motivations of Earnings Manipulation
	Lopez Lubian, Francisco.	Does Strategy Create Value? Isofoton and the Grid-Parity Challenge
	Michelman, Jeffrey Waldrup, Bobby Gammon, Kyle	Accounting Ethics at Atlantic Companies, Inc.
	Moore, James.	Undoing the Dual Class: The Case of Magna International Inc.
	Rai, Shailendra Kumar.	IFCI: Turning Around the Ailing State Financial Institution

VALUATION OF EAT-ONLINE-ASIA

Parvinder Arora
S P Jain School of Global Management
Singapore

Case Objectives and Use

The case can be used to introduce the venture capital method of valuation of start-up firms. The case can be used for undergraduates and MBA students to explain how venture capitalists value the start-up ventures and how conventional DCF valuation may be of little usefulness in valuing start-up firms especially in the technology sector like mobile applications. The case addresses few important issues. The first is issue related to valuation of a start-up where the cash flows are negative for most of the horizon period. The second issue is to understand how the ownership is divided between the investor and the promoter. The third important issue addressed is to assess the impact of risk on the required rate of return of the investor. Another issue discussed is the creation of option pool and its impact on shareholding of investor and that of promoter. The discussion can also be extended to include some aspects such as the impact of multi stage investing on shareholding of different stake holders. It presumes the students have the basic knowledge of valuation methodologies like DCF and transaction multiples. The case can be discussed in a 75 minute class.

Case Synopsis

Mahesh B., the CEO of Human Touch Connect, has virtually locked himself in his office on Alexandra Road, Singapore. He has been working on the detailed valuation of his latest venture, a mobile convenience named Eat-Online-Asia, to be presented to the partner of Top Line Ventures, a venture capital firm, next day on 12 June, 2011. He is anxious if he would be able to convince the firm to invest the required amount of $1.5 million especially when the valuation on the basis of discounted cash flows is not very attractive and may be of little help. He is wondering what other method of valuation he can use in order to reflect the fair value of the project. The second issue that is troubling him is that in case he is successful in convincing Top Line Ventures, then how much stake he should offer to them for an investment of $1.5 million.

The author developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching notes were peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. The author may have disguised certain names and other identifying information to protect confidentiality. parzira@gmail.com +65-91680568

THE BID TO PURCHASE RARA AVIS VINEYARDS: HAS THIS BIRD FLOWN?

Armand Gilinsky, Jr. (faculty supervisor)
Sonoma State University

Kimberly Finnie (student author)
Sonoma State University

Raymond H. Lopez
Pace University

Shaun D. Richardson (student author)
Sonoma State University

Case Objectives and Use

Rara Avis explores business valuation in an industry that is closely held with limited publicly available information. This case is intended for use in an MBA or eMBA level Corporate Finance class.

The case can be used for three broad topics: financial modeling and analysis, business valuation, and negotiation. First: financial modeling and analysis. In this area, students can explore value creation strategies, internal and external risks and appropriate returns, and financial returns in capital-intensive industries. Second, to develop business valuation skills, students can be directed to build on the above financial models to calculate discounted cash flow, weighted average cost of capital, and explore valuation multiples. Sufficient data exists to analyze the valuation perspective of the Seller, the Buyer and potential investors. Lastly, the case can be used to teach negotiation. Buyer and Seller teams can be assigned, with each team calculating and justifying their valuation, then trying to reach agreement. Negotiation for the business may explore motivations, strategies and goals of Buyer and Seller.

Pre-requisite knowledge will require at minimum a solid understanding of financial statement generation and strategic analysis. The case is of sufficient depth for use as a culminating project to summarize multiple learning concepts. Specific elements of the case can be used for shorter classes.

Case Synopsis

The story opens with the tale of a serial entrepreneur, Preston "Press" McLean, who founded and sold several successful businesses before entering the wine industry. McLean formed an investor group in 2006 to acquire a premium Sonoma County winery that had fallen into disrepair. Under McLean's leadership, the winery was re-branded as Morning Star, the facility and tasting room were refurbished, and the venture grew steadily during the following six years, initially in the face of deep recession. Enjoying the benefit of a growing customer base and favorable reviews of its wines in the wine trade press, by early 2012, Morning Star had become a destination wine tourist attraction. Hoping to replicate his previous success and diversify his holdings, in January 2012, McLane formed a partnership with an old college friend, Michael Foucault. Their plan was to acquire 100 percent of a premium winery that was on the market in the Central Coast American Viticultural Area (AVA), Rara Avis Vineyards. However, the owners of Rara Avis Vineyards, Jim and Wendy Sloan, appeared to be increasingly reluctant to sell. What do the principals of the investor group need to do to consummate the proposed acquisition?

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria, BC, Canada, October 17-19. Contact person: Armand Gilinsky, Sonoma State University, 1801 East Cotati Ave, Rohnert Park, CA, 94928, phone (707) 664 2709, agilinsky@sonoma.edu. Names of the principals, companies, and locations have been changed, but all incidents and financial data are real. The case protagonist (disguised) provided written permission to disseminate this case for academic purposes only.

DIAMOND FOODS, INC.:
ANATOMY AND MOTIVATIONS OF EARNINGS MANIPULATION

Mahendra Gujarathi
Bentley University

Case Objectives and Use

Diamond Foods is the largest walnut processor in the world. It specializes in processing, marketing and distributing nuts and snack products globally. This real-world case presents financial reporting issues regarding the payments to walnut growers that were recorded by Diamond in incorrect accounting periods. The primary learning goal of the case is to help students understand the anatomy and motivations of earnings manipulation. Students will also have the opportunity to (a) apply FASB's Conceptual Framework to a real world context, (b) determine the nature of errors and compute the effects of the errors and related tax effects on financial statements, (c) prepare comparative financial statements for retroactive restatements, (d) explain the rationale for clawback provision in compensation contracts, and (e) understand the difference between real- and accrual-based earnings management.

The case is appropriate for use in courses such as introductory accounting, intermediate accounting, accounting theory, and professional accounting research at the undergraduate or graduate level. The case was class tested in five sections of Intermediate Accounting I course at the undergraduate level (99 students, taught by two instructors), six sections of Intermediate Accounting II course at the undergraduate level (107 students, taught by three instructors) and two sections of Intermediate Accounting II course at the graduate level (60 students, taught by one instructor) in Spring 2013. The faculty and student feedback was very favorable.

Case Synopsis

Diamond Foods, which was converted from a California agricultural cooperative to a Delaware corporation in 2005, grew consistently in revenues and profits until 2010. Its stock price increased from $17 in 2005 to $96 in 2011. In April 2011, consistent with its strategy of growing through acquisitions, Diamond agreed to acquire Pringles® brand of potato chips from Proctor and Gamble with the exchange of $1.5 billion of Diamond's stock and $850 million cash. The upward movement in Diamond's stock price came to a halt in September 2011 with the news questioning Diamond's accounting for payments to walnut growers. The news story was followed by an internal investigation by Diamond's audit committee and a class action suit which resulted in driving down Diamond's stock price to $14 in November 2012. The CEO and CFO of the Company resigned in November 2012 and the CEO had to pay back $2.74 million in cash as a result of the clawback provision in the compensation contract. The case requirements require students to demonstrate their understanding of the anatomy and motivations of earnings manipulation in a real-world context.

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 were peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Mahendra Gujarathi, Bentley University, 175 Forest St., Waltham, MA 02452. Phone 781-891-3408. E-mail: mgujarathi@bentley.edu.

DOES STRATEGY CREATE VALUE?
ISOFOTÓN AND THE GRID-PARITY CHALLENGE

Francisco J. López Lubián
IE Business School

Case Objectives and Use

This case is based on real figures that describe in detail the key elements associated with a company's acquisition and restructuring operation, including economic and financial analysis of the proposed strategy.

The case is intended for students studying the subject of Advanced Financial Management, and it may be used as a case study that integrates analysis of a company's different policies from the perspective of creating economic value

Case Synopsis

In autumn 2012, Angel Luis Serrano, chairman and CEO of Isofotón, was considering how to address a situation he considered crucial, both for the company and for the solar energy sector.

Mr. Serrano was aware of the difficulties facing a sector with significant excess capacity and growing competition in prices. In his opinion, survival required a global market strategy, with a significant improvement in costs and efficiency; greater vertical integration would be needed in the value chain, along with an increase in investment in research and development.

This case describes Isofotón's acquisition and restructuring operation and the strategy implemented by the company's new management team: converting the company from local and unprofitable into a global, profitable company. The case offers the chance to analyse that strategy's feasibility, profitability and eventual creation of economic value.

 Contact person: Francisco J. López Lubián, IE Business School, C/ Maria de Molina, 12, 4th floor 28006 Madrid. Spain. fco.lubian@ie.edu.

ACCOUNTING ETHICS AT ATLANTIC COMPANIES, INC.

Jeffrey E. Michelman
University of North Florida

Bobby Waldrup
Loyola University - Maryland

Kyle Gammon
Dixon Hughes Goodman LLP

Case Objectives and Use

The case illustrates how a fraud was committed in a privately held corporation. This case is indicative of the occurrence of what can happen when an employee is able to successfully use the accounting system for his own benefit without management oversight. Most importantly, the accounting issues in this case are quite simple. What is complex are the ethical dilemmas that ensue as the embezzled funds were used to benefit the community. The case examines the relationships between accounting and organizational ethics. Because the case involves simple accounting issues it is optimized in an introductory level undergraduate course or graduate accounting class.

Case Synopsis

Gernado Abrams committed a significant fraud of $666,849.67 from Atlantic Companies in Jacksonville, Florida. He did not set out to steal from his employer where he served as the corporate controller. Rather, he was trying to solve the social problems surrounding violence in his community. To do this he began a rap entertainment company—Bungi Enterprises—and later a not-for-profit company, Stop the Violence Use Your Talents, Inc. After the death of his cousin, and then his brother, he felt he needed to fund his initiatives and began to "borrow" funds from his employer by writing checks. As this process became cumbersome he began to use electronic funds transfer to move funds directly to various accounts that he controlled. Upon learning of the fraudulent checks, his employer demanded restitution in return for keeping his job and not being reported to the police. Because Gernado knew he would be unable to repay the embezzled funds within the expected time period, he transferred additional funds to his own account and paid his employer back with their own funds. Upon learning of the electronic funds transfer scheme Atlantic Companies, reported Gernado to the Jacksonville Sheriff's office. He has prosecuted and served five years in jail. The authors met Gernado while he was serving his prison sentence, throughout his work release program and are in communication with him currently. The authors have created a 50 minute videotape interview that accompanies the case.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case, instructor's manual, and synopsis were peer reviewed for presentation at the North American Case Research Association (NACRA) conference, October 18-19, 2013, Victoria, British Columbia, Canada, October 17-19 2013. Contact person: Jeffrey E. Michelman, Coggin College of Business, University of North Florida, 1 UNF Drive. Jacksonville, FL, 32224, 904-620-1541, jmichelm@unf.edu.

UNDOING THE DUAL CLASS: THE CASE OF MAGNA INTERNATIONAL INC.

James M. Moore
Wilfrid Laurier University

Case Objectives and Use

This case is intended for undergraduate or graduate finance classes that include valuation, corporate governance or corporate finance in their syllabuses. The case introduces students to the agency impacts of dual class share structures and exposes students to a unique valuation decision where prior transactions may not be truly comparable. The case also requires students to consider the transitional issues that can arise when control of a company is transferred from its founder.

Case Synopsis

In July 2010, Maria Delulu, an investment analyst at the Capital Group of Companies, has been asked to recommend to the firm's clients whether they should support Magna International Inc's share reorganization proposal. Magna International Inc. is a large international auto parts manufacturer with head offices in Aurora, Ontario, Canada. The company was founded by Frank Stronach. Frank Stronach's family trust owns all of the Class A super voting shares of Magna. Through ownership of these super voting shares, which carry 200 votes each, the Stronach family has enjoyed 67% voting control of the company since the late 1970s. The Stronach family's ownership of profits is only 0.6%. Under the proposal, the Stronach family trust agrees to exchange all of its Class A voting shares for regular Class B shares, $300 million in cash and a controlling interest in a vehicle electrification business that is being spun off as part of the reorganization. The proposed agreement also phases out the lucrative management consulting contracts between Magna and the Stronach family.

The proposal is unprecedented in terms of its size, premium paid to end control and the degree of dilution that will occur for the remaining Class B shareholders. The proposal will pay the Stronach family a 1798% premium for their shares and result in a dilution of 11.4%. Prior Canadian deals to end multiple class share structures have involved considerably lower premiums (max 350%) and dilution (max 2%). Depending upon one's opinion, the agreement can be seen as a good faith attempt to improve overall valuation through the elimination of moral hazard or as blatant wealth expropriation by the Stronach family.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: James M. Moore, Wilfrid Laurier University, Waterloo, Ontario N2L 3C5, (519) 884-0710 x5488, jamoore@wlu.ca.

DELHI INTERNATIONAL AIRPORT LIMITED
VISION OF AN AMBITIOUS ENTREPRENEUR

Abilash S. Nair and Rajesh S. Upadhyayula
Indian Institute of Management, Khozikode

Authors unable to attend NACRA 2013; eligible to submit this case to a future conference.

IFCI:
TURNING AROUND THE AILING STATE FINANCIAL INSTITUTION

Shailendra Kumar Rai
Management Development Institute

Case Objectives and Use

The issues raised in this Case are related to the economic and financial aspects of business and macroeconomic environment; their impact on the strategy, the overall business model, organization, people, corporate finance, governance and operations. The objective is to involve students in an analysis of the possible actions which could be taken to manage financial crisis, thereby enabling students to have fairly good idea about the types and the variety of issues that have to be dealt with along with some consideration of whether or not the actions taken were both needed and economically viable.

The case can be used in MBA/post-graduate management courses and also in executive management training programs in accounting, finance and strategy. It can be used as part of a class discussion on crisis management, liquidation strategy, financial restructuring, mergers & acquisitions and strategic sale. It can also be used to provide and nurture orientation towards accounting, finance and strategy. The case can also be used to highlight the need to change the business models as changed strategy under the changed economic and financial environment. The case provides an opportunity to the students to learn the restructuring process and the management perspectives requisite for turning around a state development financial institution. The case envisages an opportunity to review growth strategies, financial market and economic analysis, and leadership issues.

Case Synopsis

In 2004, the IFCI had almost collapsed; its profitability had become negative. Non-performing assets had reached their peak, and the company did not have enough money to do business. It began selling off/renting out its premises, going door-to-door to save its future, and the morale of the employees hit the lowest level. The business became unsustainable and unviable.

With this backdrop, the Board of Directors of the IFCI and the government were in great dilemma to decide on its future. After evaluating all the possible options, the IFCI and the government had decided to restructure IFCI.The turnaround of IFCI over the years, to catapult it on the path of growth, includes multiplicity of factors like conversion of debt into equity, creating provisions for bad loans, liability restructuring- retiring high cost debt, aggressive non-performing assets (NPAs) management, voluntary retirement scheme (VRS) introduced twice so as to reduce excess manpower, focus on short term projects, adopting a selective approach in identifying projects for assistance and better monitoring of projects. The most critical factors which enabled turning around of the state financial institution were the able leaders who were able to not only change the public sector culture but also to bring a new work culture and ethics to the organization. The turnaround of IFCI from the financial crisis inspired a lasting motivation in the hearts of its employees. In 2010, IFCI was recognized as the third best company in the Banking/Credit Services Industry in terms of having a great workplace.

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 were peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Shailendra Kumar Rai, Management Development Institute, Mehrauli Road, Sukhrali, Gurgaon-122007, India, +91-98117-91663, skrai@mdi.ac.in.

ESCAPE FROM OZ?
DECIDING THE FUTURE OF TAVERN ON THE GREEN

Lynn Ruggieri
Roger Williams University

Paul W.Thurston
Siena College

Authors unable to attend NACRA 2013; eligible to submit case to a future conference.

Behaving

Track Chair:
Katherine Breward, University of Winnipeg

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	Edlund, Timothy Menzie, Karol	Penalties for Cheating
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	Khurshid, Anwar Haider, Quratulain Jawwad, Abdul	Transformation at Federal Board of Revenue, Pakistan
	Linzmeyer, Simone Virmond Nakata, Lina Eiko	The Retirement Dilemma: What to Do Now?
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	Wilson-Mah, Rebecca	The Empress

SALES INCENTIVES AND PROFITABILITY SYSTEMS AT BATTERIES INC.

Michael Breward
University of Winnipeg

Case Objectives and Use

This case was written to motivate discussion on issues related to organizational change generally and change brought about by implementing various information technology solutions specifically. The case asks students to consider not only what steps were taken to increase the chance of acceptance of various organizational changes, but also what tactics, that research has demonstrated are essential ingredients for the ultimate success of implementing organizational change, were not used. As virtually every initiative mentioned in the case ended up having some degree of success, students are asked why this happened given these crucial missing elements. While the case could be used in any organizational behaviour or human resources course that examines change management and/or incentive systems, given the case's slightly more information systems focus it is probably best suited for information systems courses. It would be appropriate in an introductory information systems course in an MBA program or an advanced information systems course in an undergraduate program; and in the case of the latter, preferably after taking any required introductory OB/HR courses as topics covered in those classes would probably be useful in analyzing this case. In addition, as the protagonist is an accountant and the main issue of the case is the implementation of an accounting reporting system that will be ultimately be used to calculate the bonuses of the sales force, it could easily be used in either an undergraduate or graduate accounting information systems (AIS) course.

Case Synopsis

Alan, the Director of Finance and Information Systems, has had an exemplary career in the Canadian operations of Batteries Inc. He has been promoted three times since being hired as the Manager of Financial Planning and Analysis in the fall of 1992. Over the eleven years since joining the company, he has been involved in virtually every systems initiative undertaken by Batteries Inc. – Canada. Beyond systems implementations, Alan has also witnessed a number of other non-IT related organizational changes such as the ongoing adjustments made to the sales force incentive program. While Alan noticed that some key elements often considered necessary for successful change were lacking, virtually all the changes he witnessed and/or in which he participated were successful, at least to some degree. However, his latest project, which is to be fully in place eighteen months from now at the beginning of the 2005 fiscal year, has run into several snags.

Alan has been tasked with developing and implementing a system that will provide profitability statements based upon parameters chosen by the user (i.e. customer, sales territory, strategic business unit, etc.). This system will allow the sales force to be moved from an incentive system based upon sales to one based upon profit. Unfortunately, various circumstances (i.e. accounting being understaffed, ongoing systems and administrative issues associated with the Razors Ltd merger) have created considerable obstacles and have culminated in Scott, the Canadian President of Batteries Inc., seemingly withdrawing his support for a project that he initiated and championed. How Alan was going to emerge from this fiasco was a question Alan wasn't sure he wanted answered.

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 were peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Michael Breward, University of Winnipeg, 515 Portage Avenue, Winnipeg, MB, Canada, R3B 2E9; (204) 786-9085; m.breward@uwinnipeg.ca

LIVE BOLDLY: *SHOULD I?*

Carol Cumber
South Dakota State University

Jamie O'Brien
South Dakota State University

Case Objectives and Use

This field researched case encourages students to increase their understanding of multi-level marketing firms, and explore the potential opportunities and pitfalls inherent with this organizational structure. Specific objectives include defining and analyzing factors that indicate a good versus poor investment opportunity, assessing health claims of non-FDA approved products, and distinguishing between legal multi-level marketing firms and illegal pyramid schemes. The case is intended for students in undergraduate courses in management and organizational theory.

Case Synopsis

Kate Simpson, a married woman in her 50's, had been thinking a lot about retirement. She wondered if she and her husband would be able to retire comfortably with their current savings/investments, or if they needed to find a way to supplement retirement income. In spring 2013 she was convinced by a friend to attend a seminar, titled "LIVE BOLDLY," that invited participants to hear XANGO founder Joe Morgan share the story of XANGO and its mangosteen fruit based products that he claimed had changed the lives of millions of people around the world**.**

The seminar included passionate testimonials by distributors, and included a PowerPoint presentation on how the products addressed the needs of the masses: inflammation, fatigue, stress & depression, obesity, and restless nights. They added that if you sold the product, you were guaranteed a 50% commission. As Kate and her friend left the presentation, Kate wondered if this could be a great opportunity for her. She had scanned the information in the brochures she had received, and thought how nice it would be to have a profound impact on the lives of others, while making a lot of money in the process. Her friend, however, advised her to take some time to think about it before making any decisions. She was not convinced this was such a great opportunity. She told Kate that some multi-level marketing companies at best appealed at an emotional level to potential investors, and, at worst were basically pyramid schemes that made a lot of money only for the people who start them. Kate responded that she had heard nothing that would suggest that this was anything other than a legitimate multi-level marketing firm, and she was excited about this potential opportunity. All she had to do was sell a great product and recruit some others to sell the product. How hard could that be…..right?

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Carol Cumber, South Dakota State University, Department of Economics, Scobey 504, Brookings, SD 57007, 605.688.4849, carol.cumber@sdstate.edu.

PENALTIES FOR CHEATING

Timothy W. Edlund
Morgan State University

Karol V. Menzie
Free-Lance Writer

Case Objectives and Use

This lightly disguised case is designed for discussion by faculty in any discipline that uses discussion method teaching, in both management and other disciplines, in learning better to deal with similar cheating issues in their teaching. It may also be appropriate to use with doctoral students, either in courses about teaching or in discussions about the teaching assignments most of them will undertake.

The case presents a series of decision points, each less than two pages long, so that the case may be fully discussed in one class of 80 minutes, without advance preparation by participants.

Case Synopsis

Professor Henderson, in grading the final papers required for his course in Strategic Management, found two papers in which the last half of each paper was substantially identical. Knowing that Northern State had a variety of possible penalties for academic dishonesty, he considered what penalty he should impose or recommend for these two candidates for graduation, scheduled 1-1/2 weeks later.

He makes his initial decision, is faced with a series of communications with the students involved and with his department chair and, eventually, with other administrators.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria, British Columbia, Canada, October 17-19 2013. Contact person: Timothy W. Edlund, Morgan State University, 1700 E. Cold Spring Lane, Baltimore, Maryland 21251 USA. Phones: +1-443-885-1687 (O), +1-443-844-2443 © tim.edlund@morgan/edu

TOLUCA (A) to (E)

Jim Joseph
Le Moyne College

Dan Orne
Le Moyne College

Martha Grabowski
Le Moyne College

Josep Franch
ESADE Business School

Case Objectives and Use

The objective of the *Toluca* case series is to inform future 21st century business leaders about leading a company turn-around within an international setting at the dawn of globalization. This is the story about a young manager who leaves the comfort of a corporate headquarters to take the helm at a foreign subsidiary in Toluca, Mexico. Rich with lessons in forward-thinking leadership, cultural sensitivity, and managing a turn-around; this case series can be used in leadership, international business, and cross-cultural courses (at both the undergraduate and MBA levels).

Case Synopsis

Following Mexican President Carlos de Gortari Salinas' late 1980's trade liberalization policies that ignited an onslaught of foreign direct investment (e.g., maquiladoras) – and ultimately lead to the passage of NAFTA (1993) – Oneida Ltd. made the decision to quadruple the production capacity of their Toluca, Mexico flatware (spoons, forks, knives) factory. Following the initial team-on-the-ground's failure to execute the new strategy, 30-year old Ed James was sent to Mexico in a last-ditch effort to salvage the situation. What ensues is a remarkable story of humane leadership and cross-cultural understanding punctuated with Oneida Mexicana, S.A. being awarded Mexico's 1994 National Export Award. The citation read aloud at the *Los Pinos* (Mexico's "White House") ceremony where President Salinas presented the award to Ed James made direct reference to the respect for Mexican culture and dignified treatment of the workforce. Indeed, President Salinas was holding up Oneida Mexicana, S.A. as an inspiration for other Mexican companies. It is important to note that the very same factory is alive and well today (2013).

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Jim Joseph; Le Moyne College, 1419 Salt Springs Road, Syracuse, NY 13214; Tel. 315.264.0065;
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TRANSFORMATION AT FEDERAL BOARD OF REVENUE, PAKISTAN

Anwar Khurshid, Quratulain Haider, Abdul Jawwad
Lahore University of Management Sciences

Case Objectives and Use

This case can be taught effectively to MBA students as well as executives at any level in courses related to organizational behavior, managing change, managing public-sector organizations or strategic management. The case describes the process of a multi-year organizational transformation effort at Federal Board of Revenue (FBR), Pakistan and illustrates the challenges of managing change in a public-sector organization. As a result of preparing and discussing this case, the students will develop an understanding of the dynamics of organizational change and the inter-relationship of various aspects of the organization in a large-scale transformation effort. What's more, the students will be able to appreciate the constraints faced in a public-sector organization related to organizational change.

Case Synopsis

In May 2008, the Chairman, Federal Board of Revenue (FBR), Pakistan, was reviewing the progress of the Tax Administration Reform Project (TARP) underway in FBR for more than five years. TARP was initiated by the Federal Government of Pakistan with funding from the World Bank (WB), to reform the tax administration in the country with the objective to expand the tax base, increase voluntary compliance, and change the image of FBR in the society.

FBR had taken a comprehensive approach to organizational change. They had introduced several significant changes including a new organizational structure, and a new information technology (IT) infrastructure. Among other things, the physical work-space environment was changed from the traditional closed-door individual offices to a more open-space corporate look-and-feel.

Over the past few years, several achievements had been made towards the reforms; however, momentous challenges still lay ahead. The new organizational structure led to increased uncertainty among the employees, and the functional units in the new structure lacked mutual coordination resulting in delays and inefficiencies. The renovated open work environment with a contemporary corporate look-and-feel was interpreted by many as imitating the West and was not considered to be reflective of the national culture and society, particularly with regard to the female employees.

The Chairman, FBR, was concerned that the funding for the reforms project would end in December 2009 and the change process would need to continue beyond that. However, resource mobilization for revenue generation was still weak. The Chairman was contemplating his next steps that would sustain the positive accomplishments of the transformation effort, and would effectively address the challenges and issues still lingering in the organization.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Anwar Khurshid, Lahore University of Management Sciences, Lahore, Pakistan, 924235608284, anwar@lums.edu.pk

THE RETIREMENT DILEMMA:
WHAT TO DO NOW?

Simone Virmond Vieira Linzmeyer
Universidade de São Paulo

Lina Eiko Nakata
Universidade de São Paulo

Case Objectives and Use

The purpose of this teaching case is to present and discuss key issues for a career decision, considering individual aspects, context and time of retirement. The individual aspects are focused on self-knowledge, willingness to learn, career building, the development of relationships networks and values. Regarding the context, one can explore the constantly changing labor market, especially when affected by external actions. Finally, we suggest the importance of the transition to retirement, following a traditional successful career.

The teaching case can be used in undergraduate and postgraduate courses, specialization programs and preparation for career consultants. Traditional concepts of career, career transition and retirement are needed to better use the case.

Case Synopsis

Sergio was born in southern Brazil in a family of German origin. His first language was German. He studied in one of the best schools in the city, took a technical course in metalworking and graduated in mechanical engineering, at which time he also studied English and taught at the technical school where he had studied. He worked as a trainee in a large foundry which gave him a permanent position immediately after graduation. Later, he was invited to work at Consul refrigerator factory, where he quickly ascended from an engineer in the industrial area to the chief technology advisor, a position he held for four years. For his outstanding performance, he was invited to take over the refrigerator production management. With the onset of globalization, Consul was sold to Whirlpool Corporation Group, and Sergio went through a process of job rotation, got to know all the organization and at the end of the process took over marketing management. Despite the crisis in other companies in the same industry, sales at Consul were surprising. He was then promoted to national sales manager, breaking all sales records. After 19 years in the company, he was elected commercial director by the board on the day he completed 37 years. The company received the title of best company of the year. The merger of Consul with Brastemp and Semer, created Multibrás SA, the largest white goods industry in Latin America. With conflicts resulting from this process, came the threat of dismissal and after 22 years with the company he was invited to work at another company in the same segment. Defying all corporate prejudices, he accepted the job and faced the big dilemma that was working in Prosdócimo. His function was to prepare the company to be sold. Reaching a market value three times higher, the sale was a success. He went to work in a textile company, but it did not work out and he accepted the invitation to work at CCE. His goal was to build a factory to operate and sell it. Again, he achieved all the goals. What would he do now?

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note were peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Lina Eiko Nakata, Universidade Federal de Uberlândia, Av. João Naves de Ávila, 2121, sala 5M102, Uberlândia-MG, Brazil, +55 11 996873283, linankt@gmail.com.

KARL KNAUZ BMW:
FIRE FOR FACEBOOK?

Gabrielle Lopiano (student author)
Mary Anne Watson (faculty supervisor)
The University of Tampa

Case Objectives and Use

The purpose of this case is to help students identify the issues employers face regarding their employees' use of social media platforms and understand the ways social media technology impacts human resource management in organizations. Students will gain insight into the protections provided to employees under Section 7 of the National Labor Relations Act. Discussion of the case should guide students toward understanding the importance of developing appropriate and legal social media policies within organizations.

The case is primarily for use in both undergraduate and graduate level human resource management courses, including Human Resources Strategy, Human Resources Decision Making, Labor and Employee Relations, and Employment Law.

Case Synopsis

Bob Becker, a salesman at Karl Knauz BMW, was discontent when he learned that the luxury car dealer planned to serve a variety of inexpensive refreshments at a June 2010 new product launch. He and his colleagues on the sales staff were concerned that the decision would negatively affect their sales and commissions. After voicing these concerns to the sales manager to no avail, Becker took pictures of himself and his coworkers mocking the refreshments at the event with the intent to post them online. A week after the BMW event, there was an accident at a company-owned Land Rover dealership where a customer's son drove a car into a nearby pond. Becker also took pictures of the scene.

On June 14, Becker posted photos of both the BMW event and the Land Rover accident to his Facebook page accompanied by rude and derogatory captions about the company. The following day, the management team at Kanuz BMW learned of the postings through phone calls received from neighboring Land Rover dealers. Two days after the Facebook postings, Becker's managers called him into a meeting to address his actions. At the end of the meeting, Becker was told to leave and that he would be informed when management decided what action to take. The case addresses the business, legal, and ethical components behind the decision.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Gabrielle Lopiano, The University of Tampa, 401 W. Kennedy Blvd. Tampa, FL 33606, (610) 533-9822, gabrielle.lopiano@spartans.ut.edu

DEVELOPMENT OF CASE STUDIES
TO MANAGE KNOWLEDGE IN AN IT INSTITUTION

Sergio Carrera Riva Palacio
Infotec Research Centre

Jaime Martínez Díaz
Infotec Research Centre

Case Objectives and Use

The main objective is to evaluate the relevance of using case studies to generate new knowledge in a research centre focused in information technologies, identifying the variables regarding organizational environment that can influence the project's results. The complementary learning objectives are the following: to understand the relation between the case studies methodology and the generation of knowledge; to identify the obstacles to develop a new knowledge management culture and to evaluate if an institution is prepared to carry out a knowledge management project based on the case study methodology. The target audience of this case are undergraduate students, and it can be taught in Knowledge Management, Organizational Culture and Change Management courses. The discussion and analysis of this case will help the students to understand the complexity of managing knowledge in an institution where this concept has not reached a maturity level yet. Moreover, the students will be able to determine if the development of case studies is an appropriate tool to generate knowledge in an IT research centre.

Case Synopsis

By the end of April 2013, the Case Studies Project implemented to support knowledge management inside Infotec, an IT research centre located in Mexico City, was going through an uncertain stage. Sebastian Carrillo, Infotec's CEO, had asked Javier Morales to find a solution that accelerated this project, which was part of the strategic plan implemented to generate new knowledge within the institution. Javier, who served as the coordinator of the study case development, understood the need to give an answer to Sebastian's petition. The goal to reach in 2013 was to have 12 case studies finished by the end of the year and Javier had to find the way to unlock the state in which the project was stuck, given that up to that moment, there was not a single case finished. Javier had two weeks to present his proposal to Sebastian.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013- Contact person: Sergio Carrera Riva Palacio, Infotec, Av. San Fernando 37, col. Toriello Guerra, Del. Tlalpan, C.P. 14050, México, D.F. Phone number: +52 55 56242810. Email: sergio.carrera@infotec.com.mx

COMPARTAMOS BANCO
(PARTS A AND B)

Antonio J. Sancho
IPADE Business School

Author unable to attend NACRA 2013; eligible to submit case to a future conference.

ST. JOHN THE COMPASSIONATE MISSION, ORGANIZATIONAL CULTURE & LEADERSHIP: EAT, PRAY, WORK

Colleen Sharen
Brescia University College

Case Objectives and Use

This case shows how changes of leadership and in the external environment create pressure for change in organizational cultures. Intended for upper year undergraduate or introductory graduate level courses, this case may be taught in leadership or organizational behaviour courses. Upon successful completion of this case students should be able to:

1. Describe the dimensions of servant leadership, organizational culture and succession planning.
2. Compare servant leadership to other leadership approaches, identifying the strengths and weaknesses of servant leadership.
3. Discuss the concept of servant leadership in organizational culture.
4. Develop a succession planning process to support, maintain and build organizational culture.
5. Evaluate the appropriateness of servant leadership in other contexts.
6. Express whether servant leadership fits with the student's personal beliefs and values.

Case Synopsis

In late May, 2013, Father Roberto Umbertino, the Executive Director of the St. John the Compassionate Mission (SJCM or the Mission), sat down to plan for his next Board retreat scheduled to occur in early July. As the founder of SJCM, Father Roberto had been a driving force behind the Mission for the past twenty-seven years.

Recently, two Missions similar to SJCM had experienced crises when their leader/founder unexpectedly left the organization, leaving vulnerable people at risk. Father Roberto reflected that a community was not something that belonged to the founder. Good leaders were stewards of the organization, they prepared their organizations for succession.

Father Roberto was the face of the Mission's brand. But now it was time to plan for his retirement. He needed to engage SJCM community members, senior staff leadership council, staff members and Board members to develop a plan that ensured the transition of leadership, stability of the Mission, maintenance of its culture and protection of the vulnerable members of the SJCM community. The next Board meeting was an ideal time to start this conversation.

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 were peer reviewed for presentation at the NACRA 2013 Conference, Victoria, British Columbia, Canada, October 17-19, 2013. Contact person: Colleen Sharen, Brescia University College at the University of Western Ontario, 1285 Western Road, London, ON Canada. 519-432-8353, csharen@uwo.ca.

Rebecca Wilson-Mah
Royal Roads University

Case Objectives and Use

This case was developed for the BA in International Hotel Management for a fourth year level course IHMN 455 - Human Resource Issues and Practice. This course introduces both operational and strategic human resource management responsibilities and practice that are particularly applicable to the hospitality industry including: workplace culture, strategic human resource management, recruitment and selection, performance management and current HR issues management.

This case was developed to offer a hospitality-specific decision case in human resource management. Issues raised in this case include performance management, performance appraisal methods, line management responsibility, change management and strategic human resource management.

On completion of this case it is anticipated that students will develop an appreciation and insight into the following issues:

- Effective and timely performance appraisals are a strategic priority in organizations today at every level yet in many organizations performance reviews are not completed on an annual basis.
- Performance appraisals should meet the unique requirements of the department and/or organization to reflect the strategic priorities, culture, values, standards and operational requirements of the job, yet this is not always achieved.
- The effective implementation of performance reviews requires a partnership between the human resource management department and line managers; how can this partnership be nurtured and strengthened?
- There are several different performance appraisal methods, for example, graphic rating scale and behaviourally anchored rating scales; what are the key considerations when selecting an appraisal method for a housekeeping department?
- HR professionals are change agents in organizations; how can HR effect change to processes and procedures and also influence organizational culture effectively?

Case Synopsis

This case takes place on March 20, 2011 and the case decision maker is David White, HR Director for a 477 room hotel located in the heart of a tourism destination that attracts discerning travellers from around the world. The hotel is managed by a multi-national hotel management company that manages 58 properties. On March 20, 2011 a new directive to ensure the completion of annual performance reviews was announced by Chris Cahill, Chief Operating Officer (COO) at the Regional Leadership Conference in Vancouver, BC. With a clear directive from the COO, White had a golden opportunity to effect change – but how should he proceed?

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 were peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Rebecca Wilson-Mah, School of Tourism and Hospitality Management, Royal Roads University, 2005 Sooke Road Victoria British Columbia, Canada, 250.391.2600 ext. 4514, rebecca.wilsonmah@royalroads.ca

Cases Written in French

Track Chairs:
Ronald Kamin, ISC Paris
Sabine Ruaud, EDHEC

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	Bares, Sabrina Kratz, Christine.	Michel & Augustin : À la Conquete du Gout! Pour une Demarche de Co-Production Avec le Client
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MICHEL & AUGUSTIN: À LA CONQUÊTE DU GOÛT !
POUR UNE DÉMARCHE DE CO-PRODUCTION AVEC LE CLIENT

Sabrina Barès, Université de Bourgogne (France)
Christine Kratz, ICN Business School (France)

Objectifs du cas et utilisation

La présente étude de cas est parfaitement appropriée dans un cours portant sur le management de l'offre commerciale, sur la gestion de lancement de produit ou sur le design produit. Elle s'adresse plus particulièrement à un public d'étudiants de premier cycle.

Les problématiques abordées requièrent de la part des apprenants :

- de faire le lien entre des informations primaires ou secondaires et des recommandations stratégiques et tactiques qui en découlent par le biais du diagnostic marketing ;
- de formuler des recommandations en tenant compte des concepts vus en cours (gestion des gammes produits, profondeur et largeur de gamme, conception de packaging, stratégies et méthodes de fixation des prix, règlementations, ...) ;
- de développer des idées créatives et réalistes en termes de lancement de nouveaux produits.

Les objectifs pédagogiques visent à développer tant l'esprit d'analyse que la créativité des étudiants (fiches d'évaluation proposées pour dossier et soutenance orale). Ils portent sur :

- La maîtrise d'une méthode et d'outils d'analyse liés au diagnostic marketing ;
- L'appréhension de la nécessaire cohérence entre l'élaboration d'un diagnostic et les recommandations (stratégiques ou opérationnelles) ;
- La maîtrise des concepts relatifs au management de l'offre commerciale ;
- La formulation de recommandations stratégiques et tactiques en termes de management de l'offre commerciale ;
- L'initiation à une démarche créative et de co-production avec le client en matière de design packaging.

Cet outil pédagogique peut constituer un cas de synthèse. Il est conçu pour être travaillé et animé en groupes (équipes).

Résumé du cas

Au début de l'année 2013, la jeune entreprise Michel & Augustin (ci-après M&A) commercialise sur le territoire français plus de 80 références réparties sur cinq gammes de produits (gâteaux sucrés et salés, fruits mixés, produits laitiers et desserts frais). Depuis sa création en 2004, grâce à une stratégie marketing créative et décalée et une promesse produit basée sur le « 100% vrai », les deux fondateurs ont relevé le défi de lancer avec succès des produits sur des secteurs d'activités matures, dominés par de grandes firmes multinationales.

Les fondateurs de l'entreprise, Augustin Paluel-Marmont et Michel de Rovira, font appel à vous en tant que consultant(s) marketing. Vous devrez réfléchir aux axes de développement de l'offre commerciale (politique produit : nouvelles gammes et références -produits et/ou services-, design packaging ; politique de prix), tout en tenant compte et en préservant le positionnement innovant et différenciant de la marque.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria, British Columbia, Canada, October 17-19 2013. Contact person: Christine Kratz, ICN Business School, 13, rue Michel Ney, F-54000 Nancy, +33 (0)6 18 38 98 98; christine.kratz@icn-groupe.fr

EXISTER AU TRAVERS DE SON MANAGEMENT OU MANAGER AU TRAVERS DE SON EXISTENCE? L'ETHIQUE AU SERVICE DE L'ENTREPRISE PETRO-ACT

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Université de Nice Sophia Antipolis

Karima Lahmouz
Université de Haute Alsace

Objectifs et utilisation

Ce cas invite à une réflexion sur la morale et l'éthique des affaires à travers l'étude d'une grande structure publique spécialisée dans l'exploitation des ressources hydrocarbures. Les décisions managériales prises par l'équipe de direction conduisent à une réflexion profonde sur la mise en place d'une véritable charte d'éthique ou un code de déontologie capable de mieux structurée l'action collective et limiter la corruption.

Le cas expose une problématique transversale qui concerne trois domaines de compétences différents :

- L'éthique des affaires ;
- Le code déontologique;
- La notion de responsabilité sociale des entreprises.

Le cas sera de préférence traité en petits groupes (4 étudiants de niveau Master, MBA ou exécutive MBA) qui pourront proposer et confronter leurs plans d'action. Les questions posées dans le texte peuvent servir de base à la discussion.

Synopsis

Cette étude de cas porte sur le groupe pétrolier Pétro'Act qui compte environ 47 963 agents en 2010, répartis par fonction comme suit : 55% dans les fonctions cœur de métier, 23% dans les fonctions de soutien et 22% dans les fonctions de support.
En 2010, suite à l'ouverture d'une information judicaire : huit directeurs de la compagnie pétrolière, incluant le président-directeur général (PDG), sont sous une enquête de corruption et ont été licenciés et remplacés. L'entreprise désormais bénéficie d'une réputation très dégradée.

En effet, le scandale avait éclaté en Janvier 2010 et porte sur les contrats de gré à gré accordés aux groupes internationaux pour des équipements de contrôle et de sécurité. Les dirigeants de l'entreprise ont instauré une règle pour octroyer des marchés, selon une convenance commune, à des compagnies pétrolières ou des sociétés de service. Celles-ci soumettent des offres gonflées, puis elles rétribuent les initiés de Pétro-Act.

Nous citons l'exemple d'une multinationale qui a obtenu un contrat « d'un milliard de dollar» de gré-à-gré pour construire une usine de gaz naturel liquéfié (GNL).
Les affaires rapportées par la presse ne constituent que la face émergée de l'iceberg ainsi d'autres vérités sur des affaires de corruption de tous genres (sur- et sous- facturation, évasion fiscale, négociations bâclées) ont été révélées. Plusieurs d'autres dossiers font l'objet d'audit et de contrôle (1600 contrats sont sous enquête).

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 peer reviewed for presentation at the NACRA 2013, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Chaker Boughanbouz, Université de Nice Sophia Antipolis, chaker 82@hotmail.com

KODAK OU LA FIN D'UN MYTHE ?

Nabyla Daidj, Institut Mines-Telecom. Telecom Ecole de Management
Patricia Baudier, Institut Mines-Telecom. Telecom Ecole de Management

Case Objectives and Use

L'objectif général du cas est de développer une capacité d'analyse et de synthèse et la compréhension d'une situation complexe et difficile à laquelle se trouve confronté un grand groupe international et légendaire. Il s'agit ici d'étudier Eastman KODAK, entreprise mythique, qui se retrouve en quasi faillite en janvier 2012. Ce cas décrit l'évolution du positionnement de KODAK ainsi que de sa stratégie d'innovation. Il synthétise les facteurs externes et internes qui expliquent cet échec. Il met l'accent sur le concept de « cycle de vie » d'une organisation et les implications pour KODAK.

Ce cas est destiné à un large public d'étudiants (Universités, Ecoles de commerce et d'ingénieurs) de niveau master (M1 et M2).

Case Synopsis

Le 19 janvier 2012, Eastman KODAK , société américaine mondialement connue, a demandé au tribunal de New York à être placée sous la protection de la loi sur les faillites (Chapitre 11) afin de pouvoir plus sereinement préparer la restructuration et la transformation du groupe. En effet, le Chapitre 11, qui encadre les faillites des entreprises aux Etats-Unis, permet notamment aux sociétés de pouvoir continuer leur activité en assurant une sauvegarde de l'emploi et en leur fournissant la possibilité de se restructurer sans la pression des créanciers.

Un an et demi après, le 2 mai 2013, Eastman KODAK a annoncé une sortie prochaine du chapitre 11. La société a, en effet, passé un accord de cession avec son principal créancier, le fond de pension britannique UK Kodak Pension Plan (KPP), cession portant sur deux activités du groupe : Personalized Imaging et Document Imaging.

L'objectif de ce cas est d'analyser l'évolution de la stratégie de KODAK. Comment une société aussi innovante et connue que KODAK a pu connaitre un déclin aussi rapide et se trouver sous la loi des faillites (Chapitre 11) ? La faillite de KODAK peut-elle s'expliquer par des facteurs externes, des dirigeants peu visionnaires ayant adopté de mauvaises orientations stratégiques (facteur interne) ou par le déclin inévitable propre à toute organisation (théorie du cycle de vie)?

Cette étude historique rappelle les faits récents qui ont conduit KODAK à la faillite ainsi que les principaux événements depuis la création de KODAK en 1880. Cette analyse historique reprend également les principales phases technologiques du secteur de l'image.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19, 2013. Contact person: Nabyla Daidj, Institut Mines Telecom, Telecom Ecole de Management, 9 rue Charles Fourier, Evry, 91011, France, 33-1-60764141, nabyla.daidj@telecom-em.eu

ACCOR ACCELERE SON DEVELOPPEMENT EN ASIE PACIQUE

Sylvie Hertrich
EM Strasbourg
Université de Strasbourg

Case Objectives and Use

Le cas porte sur la stratégie de développement international du groupe Accor, en particulier le développement en zone Asie Pacifique. Il met en exergue la nouvelle stratégie du groupe, le positionnement du portefeuille de marques allant de l'hôtellerie de luxe à l'hôtellerie économique et la politique du « right asset ».

- Il est demandé aux étudiants d'analyser les choix effectués par Accor sur les marchés internationaux et de formuler des recommandations concernant le développement futur du groupe en Asie-Pacifique, et plus particulièrement dans un pays très prometteur : le Vietnam.
- Le cas peut être utilisé pour un cours de marketing international.
- Il est particulièrement adapté pour les étudiants des écoles de commerces et des universités (formation initiale ou formation continue).
- Les objectifs du cas consistent à :
- Sensibiliser les étudiants à la démarche de l'internationalisation des activités,
- Préparer un diagnostic de la situation d'un groupe sur les marchés internationaux (forces/faiblesses, opportunités/menaces),
- Evaluer le choix des modes d'entrée sur les marchés étrangers,
- Analyser la localisation des activités internationales,
- Formuler des recommandations pour les orientations stratégiques futures,
- Familiariser les apprenants avec les spécificités du marché du tourisme.

Case Synopsis

D'ici 2015, les économies émergentes comptabiliseront plus d'arrivées de touristes internationaux que les économies avancées, et en 2030, elles devraient représenter 58 % du marché mondial. On assistera à une progression des parts de marché de l'Asie et du Pacifique (30 % en 2030 contre 22 % en 2010), du Moyen-Orient (8 % contre 6 %), de l'Afrique (7 % contre 5 %), tandis que la baisse se poursuivra en Europe (41 % contre 51 %) et dans les Amériques (14 % contre 16 %).
Le groupe Accor constitue un des premiers opérateurs hôteliers mondiaux en étant présent dans 92 pays avec plus de 3.500 hôtels et 450.000 chambres. Leader en Europe, le groupe bénéficie d'un large portefeuille de marques qui propose une offre allant du luxe à l'économique : Sofitel, Pullman, MGallery, Grand Mercure, Novotel, Suite Novotel, Mercure, Adagio, ibis, ibis Styles, ibis *budget* et hotelF1.
Pour atteindre son objectif de développement, le groupe souhaite renforcer sa présence dans les marchés émergents, notamment en Asie-Pacifique, où les opportunités de croissance sont exceptionnelles.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Sylvie Hertrich, Université de Strasbourg, EM Strasbourg, 61, avenue de la Forêt-noire, 67000 Strasbourg, France, Phone: 00.33.3.88.98.80.58, sylvie.hertrich@em-strasbourg.eu

LA NOUVELLE COMPAGNIE DU PONANT

(POUR UN MODÈLE DE CROISIÈRE À LA FRANÇAISE, DE L'INNOVATION DANS LA TRADITION !)

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Groupe Sup de Co La Rochelle

Véronique Mondou
Université d'Angers (IMIS – ESTHUA)

Case Objectives and Use

Ce cas s'intéresse à l'industrie de la croisière et plus précisément au segment des croisières de luxe. Il décrit les réflexions stratégiques des dirigeants de la Compagnie du Ponant, suite à leur rachat par un fonds d'investissement. Objectifs pédagogiques:

- Familiariser les apprenants aux spécificités du marché de la croisière et aux innovations du secteur ;
- Réfléchir au nouveau positionnement de la Compagnie, au renouvellement de son offre, aux évolutions qui devraient marquer sa stratégie de communication (réflexion sur la marque) et à la problématique de l'internationalisation ;
- S'intéresser à la question du développement touristique en milieux fragiles (notamment tourisme polaire), aux impacts sur l'environnement des croisières de loisirs et par conséquent, aux modèles de Responsabilité Sociale des compagnies.

Ce cas pédagogique peut être utilisé, soit dans le cadre d'un cours de marketing du tourisme, soit dans le cadre d'un cours consacré à la responsabilité sociétale, soit dans le cadre d'un cours de stratégie générale d'entreprise. Il peut également constituer une spécialisation secteur (analyse du marché de la croisière) pour des étudiants en tourisme. Il vise principalement des étudiants de fin de cursus, de niveau bachelor 3ième année, masters spécialisés (notamment en tourisme), ou MBA.

Case Synopsis

La Cie du Ponant, a illustré pendant des années le modèle de croisières de luxe à la française : des bateaux de petite taille et des équipages français, un service haut de gamme, des destinations exceptionnelles. Non content de proposer une expérience unique, il était essentiel pour la compagnie que les passagers se sentent comme chez eux à bord de ses navires !

Le 3 septembre 2012, la compagnie a changé de propriétaire, elle appartient désormais en partie à un fonds d'investissement Bridgepoint, qui réfléchit à un nouveau positionnement. Le changement d'actionnariat doit permettre à la Compagnie du Ponant de poursuivre son développement et de lancer de nouveaux investissements. Tourmag le journal des professionnels du tourisme titrait le mercredi 12 septembre 2012 « *Bridgepoint : la Compagnie du Ponant garde son cap* », l'objectif de notre cas est de vérifier ce qu'il en est. Comment faire en sorte que cette compagnie devienne un des leaders du segment des croisières haut de gamme, sachant que son image actuelle est définie autour de trois valeurs essentielles : authenticité, élégance et excellence française.

Pourra t'elle conserver les deux concepts clés sur lesquels elle se basait jusqu'à présent : le yachting de croisière et les croisières dans les pôles, devra t'elle le faire évoluer, sont t'ils adaptés à un rajeunissement de la clientèle et une pénétration des marchés étrangers ? Sur quelles valeurs la Compagnie du Ponant doit-elle désormais communiquer ? Comment développer une stratégie de conquête au travers de l'innovation ?

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19, 2013. Contact person : Marie-Noëlle RIMAUD, Groupe Sup de Co La Rochelle, 102 rue de Coureilles Les Minimes 17024 La Rochelle Cedex 1, France, 33-1-677352196, rimaudmn@esc-larochelle.fr / Pseudonyme Skype : rimaudmn

BONDUELLE SE LANCE DANS LE BRANDED RETAIL AVEC BONDUELLE BIENVENUE: UN NOUVEAU LIEU D'EXPERIENCES POUR LE CONSOMMATEUR DE LEGUMES

Sabine Ruaud
Edhec Business School, Lille, France

Véronique Boulocher
Brighton Business School, UK

Objectives and Use

Ce cas pose la problématique du Branded Retail, à savoir comment une entreprise, en l'occurrence le géant légumier du Nord, à l'étroit dans les grandes surfaces, maltraitée par les linéaires, en mal d'affection, « descend dans la rue » pour ouvrir un nouveau concept de surface commerciale d'une centaine de mètres carrés qui ose l'hyperspécialisation en creusant un unique filon : le légume sous toutes ses formes. Aujourd'hui synonyme de marque, Bonduelle sera-t-elle demain un nom d'enseigne ?

Ce cas trouvera sa place dans un cours de stratégie marketing, de distribution ou de marketing expérientiel. Il illustre la difficulté de passer de l'industrie au commerce, du métier de fabricant à celui de distributeur et questionne sur la manière d'instaurer un nouveau lien avec le consommateur. Il s'adresse à des étudiants de 2ème ou 3ème année en grandes écoles de commerce et de gestion, aux étudiants des universités en Bachelor ou Master, ainsi qu'aux responsables d'entreprise dans le cadre de programmes de formation continue.

Case Synopsis

L'industrie agro-alimentaire est confrontée, en France, à une situation particulièrement complexe : maturité du marché, intensité de l'affrontement concurrentiel, érosion du capital confiance du consommateur à la suite des crises alimentaires successives, etc. Aussi, dans un monde de plus en plus soucieux de son avenir… nutritionnel, Bonduelle, entreprise française spécialisée dans la transformation industrielle des légumes et leader mondial du légume prêt à l'emploi, crée et teste à côté de son siège social, à Villeneuve d'Ascq (Nord), un nouveau concept : Bonduelle Bienvenue, un magasin d'usine – vitrine tous légumes, entièrement dédié aux légumes transformés. Il s'agit pour Bonduelle de concevoir une expérience complète de sa marque en déployant une nouvelle stratégie de branded retail ; le magasin Bonduelle Bienvenue doit permettre à l'industriel d'aller au contact du consommateur en développant 3 univers différents : un espace Bonnes Affaires (produits de déstockage ou fins de série) ; un espace Produits, dédié à la quasi totalité des produits (français et étrangers) commercialisés par le groupe ; un espace Information à visée pédagogique.

Après deux ans d'existence et des premiers résultats prometteurs, Pierre Masse -Directeur de Projets Bonduelle- et Sandrine Debreyne -Responsable magasin Bonduelle Bienvenue- souhaitent donner la pleine impulsion à ce concept hybride et confient à leur nouveau stagiaire marketing la mise en place d'un plan de développement marketing. Le but est de miser sur la production d'expériences afin de renforcer la relation à la marque.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Sabine Ruaud, Edhec Business School, 24 avenue Gustave Delory, 59057 Roubaix Cedex, France, 33-3-20154539, sabine.ruaud@edhec.edu

« COACH-CACHE » - LES DESSOUS D'UNE DEMANDE DE COACHING

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Pauline Fatien Diochon
Menlo College, CA

Objectifs du Cas et Utilisation

Ce cas fictionnalisé place les étudiants dans la position d'un consultant en conduite du changement qui aide la direction d'un site industriel à décider de la pertinence de la mise en place d'une démarche de coaching individuel pour ses cadres. Le coaching est-il une bonne solution pour accompagner ce changement organisationnel? Pour établir leur diagnostic, les étudiants sont amenés à replacer cette demande dans son contexte environnemental, stratégique et culturel, et son évolution au fil des années qui a bouleversé les identités professionnelles, et redistribué les rôles et pouvoirs des acteurs. Ce cas permet ainsi d'illustrer les conséquences des évolutions de la conjoncture économique sur la stratégie organisationnelle et le modèle de gestion des ressources humaines. En particulier, il conduit les étudiants à replacer l'essor d'une demande de coaching dans son contexte socio-économique et culturel et à en appréhender ses multiples fonctions (explicites, implicites et ses dysfonctions). Cette approche contextuelle permet de souligner l'importance de l'environnement dans l'adoption et la réussite des pratiques d'accompagnement au changement ainsi que les jeux d'acteurs et de pouvoir sous-jacents. Ce cas incite alors à adopter une vision systémique d'une décision d'accompagnement et à en saisir la nature contingente. A une époque où le coaching a tendance à être rapidement envisagé comme une « réponse » au « besoin » de changement, ce cas incite à envisager ses limites par l'analyse de certaines de ses dérives. Cette approche critique du coaching, et plus largement des pratiques d'accompagnement au changement, offre des perspectives alternatives aux approches adaptatives et instrumentales. Il constitue l'une des rares ressources pédagogiques sur le coaching et conviendra tout particulièrement à un public de Master Ressources Humaines (M1 et M2, Formation Initiale ou Continue).

Synopsis du Cas

Nous sommes en 2006 dans une région portuaire de France. CACHALOR, l'un des sites d'un groupe industriel français devenu européen en 2002, est à la veille d'un rachat par un grand groupe asiatique qui en fera le leader mondial de son activité. Il s'agit du secteur de l'industrie lourde, plus précisément d'une activité de transformation de matières premières pour la fourniture de différents marchés : automobile, construction, électroménager, emballage… Le site CACHALOR compte 3500 personnes. La culture de ce site est essentiellement technique, reposant sur l'expertise d'ingénieurs et de techniciens ayant une forte spécialisation. Mais au fil des années, la nature du travail à réaliser a changé. Les évolutions environnementales et stratégiques ont bousculé les identités professionnelles fondées sur les compétences dans la maîtrise de l'outil de production, alors que les pratiques traditionnelles de gestion des ressources humaines se sont progressivement formalisées et individualisées. Ces évolutions ont eu des incidences notamment sur le rôle attendu des managers de proximité. Selon la direction, ces managers sont réticents à adopter un management de leurs équipes orienté vers le développement des compétences. Face à ces difficultés et au désengagement de certains, la direction envisage de mettre en place une démarche de coaching individuel auprès des managers. Le coaching est-il une bonne solution ? En tant que consultant en conduite du changement, aidez cette direction à prendre la bonne décision vis-à-vis du coaching !

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: [Jocelyne Yalenios, Ecole de Management Université de Strasbourg, 61, Avenue de la Forêt Noire, 67085 Strasbourg cedex, France, + 33 (0)3.68.85.88.10, jocelyne.yalenios@em-strasbourg.eu

Cases Written in Spanish

Track Chair:
Jorge Gonzalez, ITESM

	Alvarez, Jose-Domingo Lazaro Mendez Cabrera, Juan Pablo (student authors) Caco Elizondo, Silvia (faculty supervisor)	Privalia México: A la Conquista de Nuevos Mercados
	Barbosa, Jose Rodrigo Catica Alviz, Mercedes Parra.	Evaluacion de un Nuevo Servicio en la Cooperativa de Ahorro y Credito, Coofinanciar.
	Cano Giner, Josep Lluis Espin, Jordi Nicolas.	Cosmetics
	Cireddu, Alessandra Hernandez, Carlos M.	El Arquitecto y el Trabajo no Remunerado
	Oliva, Ismael B	M. Mills: La Decision de Cambio
	Sayeras, Josep M.	El Arte Cristiano

PRIVALIA MÉXICO:
A LA CONQUISTA DE NUEVOS MERCADOS

José Domingo Lázaro Álvarez (student author)
IPADE Business School

Juan Pablo Méndez Cabrera (student author)
IPADE Business School

Dra. Silvia Cacho Elizondo (faculty author and supervisor)
IPADE Business School

Objetivos y Uso del Caso

Este caso ofrece la oportunidad de analizar las dificultades de internacionalizar un modelo de negocio ya probado en países desarrollados y adaptar su estrategia comercial a un mercado emergente como México. Se sugiere usar el caso a nivel MBA en un módulo de Marketing Internacional o de e-Commerce.

El caso brinda la oportunidad de evaluar la estrategia de penetración internacional de una compañía online española que, a diferencia de su competencia, decidió asumir el riesgo de diversificarse a América Latina en lugar de continuar su expansión hacia mercados más maduros y consolidados en Europa. En el proceso de implantación en México la empresa tuvo que enfrentar dificultades inesperadas causadas por las condiciones particulares del país. Esto convirtió la tropicalización del negocio en una clave crítica para su permanencia y éxito en el nuevo mercado. El caso estimula la sensibilidad a los factores macro que deben tomarse en cuenta en el diseño de estrategias de comercio electrónico en nuevos mercados. Esto provocará cuestionamientos y mostrará a los estudiantes que, incluso, modelos altamente probados, no pueden replicarse de modo automático de un mercado a otro, debiéndose revalorar todos los aspectos de la estrategia comercial. La discusión permitirá identificar alternativas de solución que consideren los recursos y tecnologías a los que la empresa tiene acceso en el mercado en cuestión.

Sinopsis del Caso

En el verano de 2011, Miguel Giribet, Country Manager de Privalia México, es citado en Barcelona por los fundadores de la compañía, José Manuel Villanueva y Lucas Carné, para estudiar la evolución de la firma en el mercado mexicano. La empresa, que ha realizado una fuerte inversión para posicionarse en el comercio electrónico de América Latina, ha alcanzado un notable éxito en Brasil. Sin embargo, en México la situación parece más complicada. A pesar del espectacular crecimiento de su base de usuarios, y de haber alcanzado el liderazgo absoluto del sector, el outlet virtual no ha conseguido todavía los resultados esperados. Ante este desafío, Miguel Giribet debe diseñar un plan de acción comercial orientado a incrementar las ventas, salir de los números rojos y garantizar el futuro de la empresa.

Los autores desarrollaron el caso para la discusión en clase y no para ilustrar el buen o mal manejo de la situación. El caso y la teaching note fueron anónimas y detalladamente revisadas para su presentación en NACRA 2013 Conference. Victoria British Columbia, Canada, October 17-19 2013. Contacto: José Domingo Lázaro Álvarez, IPADE Business School, *Floresta* # 20, Col. Clavería. Delegación Azcapotzalco. C.P. 02080. México, D.F., +52 55 1227 8804, j.lazaro@ipade.mx

EVALUACIÓN DE UN NUEVO SERVICIO EN LA COOPERATIVA DE AHORRO Y CRÉDITO, COOFINANCIAR

José Rodrigo Cática Barbosa
Administrador Financiero

Mercedes Parra Álviz
Administradora de Empresas

Objetivos del Caso y Uso

El objetivo del presente caso es analizar el aporte económico de la implementación de un nuevo servicio de crédito en la cooperativa COOFINANCIAR e inducir a los participantes del caso a que apliquen los modelos de análisis de costo – beneficio utilidad, o puntos de equilibrio, para darle respuesta a un requerimiento urgente del Consejo de Administración de la cooperativa, quien es el organismo que desea conocer los resultados de la implementación del nuevo servicio. El caso va dirigido a estudiantes del área de finanzas, en el módulo de gerencia financiera de la especialización en Dirección de Organizaciones.

El caso, que corresponde a una situación real, involucra aspectos como: Análisis Costo – beneficio – Utilidad en procesos de intermediación de recursos, costeo de servicios, manejo de tasas de interés, procesos de intermediación de recursos, costeo variable, administración de salarios y análisis de generación de valor económico. Se espera que el estudiante comprenda la importancia de la aplicación del modelo de Costo – beneficio – utilidad en la evaluación de nuevos productos y/o servicios incorporados en las organizaciones, como resultado de estrategias de acción. Igualmente se espera que los estudiantes logren el manejo sistemático de información para la toma de decisiones en la evaluación de los resultados económicos generados por la incorporación de un nuevo producto y/o servicio, comprenda la importancia de los procesos de costeo para la evaluación de productos y servicios en las organizaciones, entienda el sistema de intermediación de recursos en la banca tradicional, aplique con precisión el sistema de costeo variable como herramienta para evaluar el aporte económico de los productos y servicios en una organización y utilice de manera apropiada el conocimiento básico en el manejo de tasas de interés y su proceso de conversión.

Resumen del Caso

El caso involucra una situación real que se presentó en el periodo comprendido entre el año 2010 y 2012, en la Cooperativa de Ahorro y Crédito COOFINANCIAR. Esta cooperativa pertenece al sector de la economía solidaria de Colombia; un sector que para el periodo de análisis viene consolidando un proceso de recuperación de su imagen, generando grandes aportes al desarrollo económico y social de sus afiliados y es responsable del manejo de grandes volúmenes de recursos captados por distintos productos y servicios. El Consejo de Administración de la Cooperativa COOFINANCIAR necesita identificar el acierto o no en las decisiones que se tomaron desde el año 2010 con respecto a la incorporación de una nueva línea de financiación para los asociados, y espera conocer con precisión si la incorporación de la nueva línea de crédito ha superado su punto de equilibrio y si ya está aportando económicamente a los resultados de la cooperativa.

Los autores desarrollaron el caso para discusión en clase en vez de ilustrar efectiva o infectivamente el manejo de la situación. El caso y la nota de la enseñanza fueron revisados anónimamente para su presentación en la Conferencia NACRA 2013, Victoria British Columbia, Canadá, Octubre 17 a 19, 2013. Persona de contacto: Jose Rodrigo Catica Barbosa, Universidad del Tolima, Barrio Santa Helena, Ibague, Tolima, Colombia. 3217607008. rodrigo.catica@hotmail.com

COSMETICS

Josep Lluís Cano Giner & Jordi Nicolás Espín
ESADE Business School

Case Objectives and Use

The objectives of this case are to:

- Introduce students to information systems project management,
- Demonstrate the importance of planning phase before the implementation phase of information systems and all the knowledge areas you have to consider.

The case was designed for use in information systems classes, especially those addressing planning in information systems implementation.

Case Synopsis

In March 2010, Ana Vilaltella, Human Resources Manager of Cosmetics, was asked to prepare a project plan for the implementation of a Human Resources module for an ERP. Her department has had different problems, so she had to ensure a success in the implementation. She only has 15 days to prepare a proposal and she has to present to COSMETICS's President and Board of Directors..

The case thus attempts to define how the information system should be implemented.

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EL ARQUITECTO Y EL TRABAJO NO REMUNERADO

Alessandra Cireddu and Carlos M. Hernández
ITESM, Campus Guadalajara

Objetivos del Caso

La actividad se dirige a alumnos de la carrera de arquitectura próximos a graduarse y ha sido aplicada con éxito al curso de Proyectos Integradores I del octavo semestre de la carrera de Arquitectura del Tecnológico de Monterrey en el semestre agosto – diciembre 2012.

El dilema conlleva dos opciones que corresponden a dos importantes reflexiones éticas en el campo de la arquitectura: (1). El trabajo no remunerado: ¿es ético trabajar solo por nuestros ideales sin una remuneración económica adecuada? (2). El compromiso del arquitecto con la población/sociedad: un arquitecto tiene el deber de desarrollar proyectos pensados para la sociedad, demostrando un compromiso con la población, haciendo proyectos que puedan favorecer y mejorar la vida de todos. ¿Esta afirmación vale siempre y a cualquier costo? ¿También cuando esto significa renunciar a una remuneración económica para el propio trabajo, con todo lo que esto puede implicar para la dignidad personal y de la profesión?

Entre los objetivos de aprendizaje planteados: que el alumno aprenda a resolver problemáticas reales y complejas relacionadas a la arquitectura, adentro de un contexto social, económico y ambiental dado, desde un punto de vista de ética profesional; que el alumno reflexione sobre aspectos relacionados con la deontológica profesional y ubique su figura profesional como parte de un gremio; que el alumno relacione temas éticos con la realidad de su futura vida profesional; que el alumno aprenda a descubrir la importancia de distintos puntos de vista y como estos pueden enriquecer su opinión personal; que el alumno aprenda a construir un razonamiento maduro basado en una visión profesional, deontológica y de valores universales.

Sinopsis

En el verano del 2010, Juan, un recién egresado de la carrera de arquitectura del Tecnológico de Monterrey, recibió el importante encargo de hacer un proyecto de remodelación de un parque en un pueblo de Jalisco. Juan era un arquitecto joven y lleno de ideales, y trabajó con mucha dedicación para proponer un proyecto cuidado al detalle y que pudiera satisfacer las necesidades de los habitantes del pueblo. Al momento de presentar el proyecto final, después de muchas horas de trabajo, cuando ya la comunidad estaba muy contenta con la propuesta, hubo un imprevisto recorte de presupuesto, por lo cual Juan se encontró frente al dilema de regalar su trabajo a la comunidad renunciando a sus honorarios, o seguir cobrando su merecida recompensa económica sin que el proyecto pudiera realizarse con la calidad prevista.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Alessandra Cireddu, Instituto Tecnologico de Estudios Superiores de Monterrey, Campus Guadalajara, Av. General Ramón Corona 2514, Nuevo Mexico, 45201 Zapopán, Jalisco, México, +52 33 3669 3000, acireddu@itesm.mx

M. MILLS:
LA DECISION DE CAMBIO

Ismael B. Oliva
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Objetivos del Caso y Uso

M. Mills es un caso que está dirigido fundamentalemnte a alumnos de programas Executive MBA o programas para ejecutivos en cursos de estrategia corporativa. El caso permite una rica discusión y análisis de los diferentes elementos que componen dicha estratégica frente a la decisión de vender o no, una unidad de negocios que está perdiendo valor para la corporación. La decisión se torna más compleja ya que esta unidad de negocios ha descubierto una nueva tecnologia que podría impactar positivamente en la creación de valor para la corporación. Por lo tanto, la decisión de venta de la unidad está vinculada fuertemente a la desición de inversión en la nueva y riesgosa tenología.

Este caso es un excelente vehículo para que los alumnos puedan desarrollar su capacidad de análisis frente a decisones vinculadas (inversión en tecnologia y valor de la unidad de negocios) en un contexto corporativo. Asismismo, para los alumnos es una excelente oportunidad para desarrollar habilidad integradora entre la corporación, la unidades de negocios y areas como la tecnología. Lo alumnos podrán aprender también, como aplicar diferentes teorias como por ejemplo la desarrollada por Collins y Montgomery.

Synopsis el Caso

A mediados del año 2012, el grupo ejecutivo de la empresa M. Mills, perteneciente al grupo corporativo MADECO S.A. debe preparar la junta de directorio a realizar a finales del mismo año para definir la venta o no de la unidad de negocios M. Mills. MADECO S.A. es un conglomerado de empresas situado en Chile orientado fundamentalemente a la fabricación de productos de cobre.

A partir del año 2010, el grupo empieza a vender sus unidades de negocio, en particular la unidad de cables, (Nexans), así como la venta de otras unidades por cambios tecnológicos que significan el uso de otros materiales más económicos que los tradicionalmente utilizados, con lo cual se empiezan a perder las sinergías y M. Mills empieza aparentemente, reducir el valor de la corporación.

No obstante lo anterior, una tecnología desarrollada por el grupo en la unidad de negocio de cable, llamado Up Cast podría dar la posibilidad a M. Mills de replantearse su posición y volver a ser un activo importante para el grupo. El grupo ejecutivo debe decidir entre vender esta unidad estratégica de negocios o poteciarla usando una nueva tecnología.

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 were peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Ismael oliva, Universidad de Chile, Facultad de Economía y Administración. Diagonal Paraguay 257. Of. 1206. Chile. Phone: 562-2978-3358. ioliva@unegocios.cl

EL ARTE CRISTIANO

Josep M. Sayeras, ESADE, Universitat Ramon Llull

Case Objectives and Use

This case presents an opportunity to study a model of monopolistic competition, both in the short and long term. In the short run, the differentiated product of the first company in the market and its rapid growth is examined; while in the long run, as a result of low barriers to entry, we observe how the introduction of new businesses in the market impacts the price elasticity of demand, leads to increased competition, and product homogenization, among others effects. Similarly, the case shows the disruption caused by a technological change in a reactionary industry, also characterized by strong traditionalism.

The objectives of the case may be tailored to different learning purposes. For example, discussing the evolution of a "market" with a monopolistic-competitive structure; highlighting the effects in both the short and long run; analyzing the different issues that occur over time; identifying competitive advantages, their sources and their ability to be maintained over time; analyzing the aspects that must be taken into account when carrying out a cost-benefit analysis.

The market of "religious imagery" has since its inception, been a peculiar market, making it interesting to analyse, both in terms of its business and its "transcendental" implications – for example, indulgences. In addition, it displays interesting microeconomic aspects that appear when we consider the, the seemingly contradictive, mechanization of artisan industries, i.e. firms that were initially handicraft-based starting some process of mechanization or mass production, while aiming not to lose the original character of the product.

Case Synopsis

The firm El Arte Cristiano and the religious imagery industry have gone through several stages of the industrial and business cycle: birth, growth, decline. In the first decade of the 21st century, the manager, Mr. Pep Oliveras i Coll, began a series of initiatives with the aim of boosting company sales. One of them was to boost the sales channel through internet - a paradigmatic situation of many small businesses today. Despite the fact that e-commerce appeared around 2004, traditional sectors like that of religious imagery had still not incorporated it into their business. But, could "saints" be sold through the net?

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 were peer reviewed for presentation at NACRA 2013 Conference, Victoria British Columbia, Canada, October 17 – 19, 2013. Contact person: Josep M. Sayeras, ESADE-Universitat Ramon Lull, Avinguda. Pedralbes, 60, Barcelona, 08034, Spain, +34934952091, josepm.sayeras@esade.edu.

Corporate Governance

Track Chairs:
Marlene Reed, Baylor University
Tupper Cawsey, Wilfrid Laurier University

	Amrhein, Denise Guithues Fisher, James.	Pablo in Peril
	Baack, Sally Silverman, Murray.	Planned Succession at Berrett-Koehler Publishing: Institutionalizing the BK-WAY and Protecting BK Values for Future Success
	Beranek, Margaret Zahller, Kimberly.	Community Gone Awry: A Tale of Accounting Fraud, Override of Internal Controls and Conflicts of Interest
	Deszca, Gene Cawsey, Tupper.	Food Banks Canada and Strategic Renewal.
	Guess, Aundrea Reburn, James.	Jefferson County: A Dark Cloud Looms.
	Haldipur, Rajesh Vishwanath, S.R. Narapareddy, Vijaya	Wipro Ltd.: The Demerger of Wipro Enterprises
	Reed, Marlene Neubert, Mitchell Waldron, Theodore.	Chick-fil-A: Voicing Values and Responding to Activism Threats
	Stein, Madison (Student Author) Biteman, James Wilson, Michael (Faculty Supervisors)	A Crisis of Confidence in Management: When Does the Board Step In?

PABLO IN PERIL

Denise Guithues Amrhein and James Fisher
Saint Louis University

Case Objectives and Use

This case is ideally suited for a range of courses dealing with issues of business conduct. This would include courses with a broader scope, such as business ethics and human resource management, as well as those with a somewhat tighter focus, such as risk management or business law. Due to the global nature of the case it is also well suited for courses in international business. This case can be used in courses at both the graduate and undergraduate level. Major topics include risk management, business ethics and international business as well as larger issues of social responsibility and human rights.

After completing their study and discussion of this case, students should have an enhanced understanding of the increased complexity of the ethical dilemmas encountered when operating in a global business environment.

Case Synopsis

In a business context that is increasingly global, ethical decisions are further complicated by cultural differences. In a less litigious society, does a human life have the same value as in the U.S.A. where personal-injury or wrongful-death lawsuits often result in large monetary awards? Should an international corporation apply American standards when compensating a family in another country for an employee's work-related death? This case examines the ethical dilemma faced when an employee working in a pharmaceutical manufacturing plant in a poverty-stricken area of Latin America suffered a heart attack following a work related "accident." His widow did not expect any wrongful-death compensation but hoped that the company would help with funeral related expenses. The corporate risk manager handling the case was torn as he struggled to determine the appropriate course of action. Being new to the position of corporate risk manager, he was acutely aware of the gravity of the dilemma he faced as he evaluated his professional obligations to his employer and the possible ramifications that could result from a wrongful-death settlement. He was also aware that he needed to consider the obligations of the corporation to the family of the deceased and to the corporation's various stakeholders (including stockholders, employees, customers, and society). His decision was complicated by the question of whether the corporation's obligations in this case were affected by the fact that the laws and customs of the country in which the plant was located did not require the company to provide any support to the family of the deceased. There was also a question of how these obligations intersected with the role of the insurer, who would administer any potential claim or settlement.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: James Fisher, Saint Louis University, 3674 Lindell Boulevard, Saint Louis, MO 63108, 314-977-3854, fisherje@slu.edu

PLANNED SUCCESSION AT BERRETT-KOEHLER PUBLISHING: INSTITUTIONALIZING THE BK-WAY AND PROTECTING BK VALUES FOR FUTURE SUCCESS

Sally Baack and Murray Silverman
San Francisco State University

Case Objectives and Use

This case can be used in an MBA, Executive or Undergraduate Strategic Management or Business, Government and Society course. It highlights the efforts of a competitively-successful, mission-driven, socially responsible publishing company to preserve its values, culture and practices for ensuring continued future success. The wide array of efforts pursued include innovative approaches, such as consideration of Benefit Corporation status and adoption of a constitution. It provides an opportunity to cover Corporate Governance topics such as: governance and ownership structures, shareholder relations, transparency, CEO and organizational succession planning, and board roles and responsibilities. This case provides students with an understanding of the approaches and complexities associated with trying to institutionalize an organization's mission. It also enables students to experience and understand the challenges encountered when choosing among equally important organizational priorities.

Case Synopsis

This case takes place just prior to and immediately following Berrett-Koehler's (BK) July 2012 Annual Shareholder Meeting and 20th Anniversary celebration. The case highlights BK CEO, Steve Piersanti, and the Board of Directors in their efforts to institutionalize "the BK Way" through a variety of legal and operational methods. BK is considered a socially responsible business and mission-driven business working to protect the values, practices and culture it considers to be a critical component of its fundamental success. BK has outperformed rivals from a financial standpoint in the intensely competitive publishing industry, and is well-known for its integrity and unique procedures. Specifically, CEO Steve Piersanti and BK consider several specific and different options for embedding the BK values in the organization's operating and ownership structures.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Sally Baack, San Francisco State University, 1600 Holloway Ave., San Francisco, CA 94103, 415-817-4312, sbaack@sfsu.edu.

COMMUNITY GONE AWRY: A TALE OF ACCOUNTING FRAUD, OVERRIDE OF INTERNAL CONTROLS AND CONFLICTS OF INTEREST

Peggy Beranek and Kimberly Zahller
University of Colorado, Colorado Springs

Case Objectives and Use

The case presents a decision dilemma involving governance within a private community. The case presents a situation in which it is discovered by a new president of the Board of Directors, as the result of an audit of the previous three years of financial records, that a number of material weaknesses existed. These material weaknesses included: The material weaknesses stated by the auditing firm were: 1) conflict of interest, 2) management override of controls, 3) disbursement approvals, 4) mis-appropriate of funds (over $40,000 worth), and 5) lack of segregation of duties. The case involves an analysis of how these things could have happened by applying ethical behavioral theories, legal implications for the person in charge of managing the finances, and questions of how the community should move forward.

Case Synopsis

This case covers a situation Mountain View Heights (MVH) which is a private gated community of 300 homes on 1800 acres located in rural Idaho approximately. The community was self-run and the governing bodies consisted of a community elected Board of Directors (BoD) with 7 members, a Finance Committee, and a committee that maintained the roads. The community was very rural and heavily forested.

During the course of four years a number of events occurred in the community which caused some very heated differences of opinions on the lack of transparency coming from the BOD, issues of conflicts of interest and misclassification of funds. A group of people, mostly BOD members, had been pushing to establish a Fire Department for MVH. The community had fire protection thru the Boise, ID fire Department which was located 2 miles from the entrance to MVH.

The MVH Metropolitan District concluded that a Fire Department as the cost, an estimated $1.5 M, was too high. Some members of the community, several of which were on the BOD, then pushed to establish a Volunteer Fire Department VFD with 30 hour per week paid captain and fire-chief positions. A vote within the community was taken which showed 63 against, 20 for and 2 undecided regarding the VFD. The group in favor of a VFD continued to push for its establishment. This continued push resulted in the establishment of a VFD, a Shelter-in-Place (SIP) and a small, preliminary budget to support the VFD.

At the next annual election all members of the BOD that had pushed for a VFD were replaced by new members, who advocated for transparency and fiscal responsibility. Lisa was voted president of the BOD. She decided to call for an audit of the finances for the previous three years. The audit revealed a total of $40,000.00 that had been misclassified as operational expenses, but had been used for the VFD. The auditor's report also listed lack of internal controls, management override of controls, concern for the disbursement approval process, and conflicts of interest on the part of BOD members.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Peggy M. Beranek, College of Business, University of Colorado, 1420 Austin Bluffs Parkway, Colorado Springs, CO, 80918 mberanek@uccs.edu

FOOD BANKS CANADA AND STRATEGIC RENEWAL

Gene Deszca and Tupper Cawsey
Wilfrid Laurier University

Case Objectives and Use

The purpose of this case is to have students understand how shifting environments requires shifts in strategic positioning. Students will consider stakeholder positions and perspectives in formulating strategy and to understand the federated structural form and its complexities.

This case is suitable for graduate level courses in organizational behavior, organizational change, strategic management or not for profit management. It may also serve as a governance case in a strategic management course. This case deals with a complex interaction of industry structure, strategic intent, vision and power It might be suitable for advanced undergraduate students

Case Synopsis

Five years after implementing a new strategy and structure, Food Banks Canada was considering whether it needed to modify its strategy to better align with the environment. Five years ago, Food Banks Canada had shifted from a loose association of food banks to a much stronger, national organization that sought to coordinate national food access strategies for the 450+ food banks affiliated with it, and be the voice for those concerned with food security for the poor in Canada. While successful in this transition to a federated governance structure, Food Banks Canada recognized that the needs were huge. Food Banks Canada was still small ($7M in revenues), and there was much more that needed to be accomplished. They faced some opposition from certain affiliated food banks, particularly some large ones, because of concerns related to their diminished direct access to national food companies. Additionally, the role of provincial bodies from governance and coordination perspectives, fundraising, and how best to create a strong national brand were issues of concern. How could Food Banks Canada best continue growing its national influence and ability to address the food access needs of the poor, while not alienating other food banks?

Learning Objectives are as follows: To have students…

1. understand how shifting environments requires shifts in strategic positioning.
2. learn how to consider stakeholder positions and perspectives in formulating strategy.
3. understand the federated structural form and its complexities.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and instructor's manual were peer reviewed for presentation at the NACRA 2013 Conference, Victoria, B. C., Canada, Octover 17-19, 2013 by Gene Deszca and Tupper Cawsey. Contact person: Gene Deszca, Wilfrid Laurier University, 75 University Ave. W, Waterloo, ON, N2K 2M5 Ph: 519-884—0710, gdeszca@wlu.ca.

JEFFERSON COUNTY:
A DARK CLOUD LOOMS

Aundrea Kay Guess and James P. Reburn
Samford University

Case Objectives and Use

The case can be used in any number of graduate or upper division undergraduate courses. There are many issues in the case that could be addressed in any or all of the following courses: Corporate governance; economics, finance, money and banking, a course where government and political issues are discussed (i.e. a law course), ethics, governmental accounting, and/or a capstone course. Students will develop evaluative, critical thinking, and decision making skills as they relate to corporate governance in a governmental entity, corruption by public officials, debt instruments, financing decisions, and ethical behavior.

Synopsis

Jefferson County was under a Consent Decree issued in 1997 by the U.S. District Court for the Northern District of Alabama that required extensive work on the sewer system that served 23 different municipalities in the area surrounding Birmingham, Alabama. The County was given eleven years to come into compliance with the Clean Water Act when most cities would have 25 or more years and less stringent requirements. The Consent Decree required an abnormal level of compliance for system overflows. Estimates to do the work ranged from $250 million to $1.2 billion. Sewer Revenue Warrants were issued at a fixed rate and were later refinanced. The financial instruments were complex. The situation led to graft, corruption, bribery and illegal activities. The Jefferson County Commission had authority to issue debt and let contracts for the work. Corporate governance was lacking within the Commission. The President of the Commission had an unusual amount of discretion with respect to certain financial transactions. The financial crisis of 2008 along with a judgment by the Alabama Supreme Court that the County's occupational tax was deemed unlawful significantly reduced revenues. In addition, debt payments were escalated leaving the County with reduced funding available for County operations. More than twenty people were prosecuted in association with the illegal activities involved in financing and construction of the sewer system. Four of the five Commissioners were sentenced for their involvement in the corruption. David Carrington was the new President of the Jefferson County Commission. Five new Commissioners were elected and had to determine if filing bankruptcy was the only way out given the down-grade of the bonds and warrants; the reduced revenues; and the corruption. Bankruptcy had its own set of problems for the county and state. Should they declare bankruptcy? If so, it would be the largest in U.S. history. How would the largest municipal bankruptcy affect the County?

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Kay Guess, Samford University. aguess@samford.edu

WIPRO LTD.:
THE DEMERGER OF WIPRO ENTERPRISES

Rajesh Haldipur
PricewaterhouseCoopers

Vishwanath S R
T A Pai Management Institute

Vijaya Narapareddy
University of Denver

Case Objectives and Use

The case has the following pedagogic objectives:

1. Discuss the advantages and disadvantages of corporate demergers
2. Understand the role played by security analysts in determining the valuation of companies
3. Discuss the fiduciary responsibilities of the board to a company's shareholders and how these affect corporate policy.
4. Discuss the time line of a typical demerger and its consequences
5. Understand the risks associated with a demerger (from the perspective of investors)

The case has been developed for use in a Corporate Governance course to demonstrate the fiduciary role of boards. It can also be used in a Corporate Restructuring course or in a module on corporate restructuring in an Advanced Corporate Finance course to highlight the issues in demergers. The case is suitable for MBA and Executive MBA courses.

Case Synopsis

In October 2012, Wipro Ltd., a NYSE listed, IT Services company announced its plan to demerge the non-IT businesses into an unlisted entity. The case highlights the governance, valuation, tax, accounting, and ethical issues surrounding the demerger. Shareholders were given three options to choose from. The case challenges students to analyze the restructuring and choose the best option from an investor's perspective. The case can be used to teach general issues in corporate restructuring as well as the fiduciary responsibilities of corporate boards. The case is especially interesting in that it provides a platform to discuss governance issues in the context of a family firm. The case shows how the preferences of majority shareholders can affect the wealth position of minority shareholders

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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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria, British Columbia, Canada, October 17-19, 2013. Contact person: Vishwanath S.R, T A Pai Management Institute, TAPMI New Campus, Manipal, Karnataka State, India 576104, e-mail: srvishy@gmail.com , and phone: 91-9008511775.

CHICK-FIL-A:
VOICING VALUES AND RESPONDING TO ACTIVISM THREATS

Marlene M. Reed, Mitchell Neubert, and Theodore Waldron
Baylor University

Case Objectives and Use

This case was constructed for use in an undergraduate or graduate course in ethics. An effective placement of the case in the course might be at the point when issues such as corporate culture and establishing an ethics program based on a values orientation are being discussed.

The case objectives are to analyze the efficacy of a business leader publicly declaring personal values which may be controversial. In addition, a further purpose of the case is to develop a framework for formulating responses to activist attacks on an organization.

Case Synopsis

Dan Cathy, CEO of Chick-fil-A, unwittingly ignited a firestorm of controversy on July 16, 2012, when he responded to a question related to his definition of marriage which came from a journalist who was interviewing him for an article in the *Baptist Press*. His response indicated that he supported the Biblical definition of marriage. The implication of that statement was that he believed marriage was between a woman and a man. In the following days and weeks, activists accused Cathy of being insensitive to those who supported other definitions of marriage.

This case recounts the experience of Dan Cathy and other business leaders who have publicly expressed their personal values, and the criticism that they have received from voicing their values. The goal of the case is to lead students to analyze the costs and benefits of giving a voice to one's values both inside and outside of one's own organization.

This case was developed for use in class discussions rather than to illustrate either effective or ineffective handling of a situation. The case and teaching note were peer reviewed for presentation at the NACRA Annual Conference from October 17 to 19, 2013, in Victoria, British Columbia, Canada. Contact person: Marlene M. Reed, Hankamer School of Business, Baylor University, One Bear Place 98006, Waco, Texas 76798. Marlene_ Reed@baylor.edu

A CRISIS OF CONFIDENCE IN MANAGEMENT: WHEN DOES THE BOARD OF DIRECTORS STEP IN?

Madison Stein (student author)
James Biteman and Michael Wilson (faculty supervisors)
Tulane University

Case Objectives and Use

This case documents a situation in which the board of directors of a large, publicly traded company may need to intervene in the work of a recently hired Chief executive Officer. It raises the question of the role and relationship of a board in a company's strategy and executive operation. It focuses particularly on the issue of the board's responsibility to take an active role in the management of the company at a time when the CEO's management appears to be resulting in poor firm performance. It also raises the question of what options a board has to act under such circumstances. This case would be ideally suited to a portion of a course in strategy or business policy which examines the relationship between a company's board of directors and its chief executive officer in the management of the company.

Case Synopsis

On June 24, 2011, JCPenney's board of directors announced that it had named Ron Johnson as the company's next chief executive officer, effective on November 1 of that year. Johnson replaced Myron E. Ullman III, the chief executive officer that the board had selected in 2005, who had failed to reach any of the long-range financial or strategic goals he announced when he accepted his role. The board chose Johnson for "his creativity and innovation, his commitment to empowering employees to deliver an unparalleled customer experience, and to making stores exciting places where people love to shop…[and for] his great consumer merchandising, marketing and operational talent." The board saw great opportunity in the unique skill set that Johnson had displayed while at Target and Apple, and hoped that he would bring the same inspiration to transform JCPenney. Johnson, in turn, demonstrated his seriousness and commitment when he personally invested over $50 million in the company by acquiring 7,256,894 shares of company common stock.

Johnson revealed his plans to transform JCPenney into "America's favorite store" on January 25, 2012. The plan included changing the company's corporate structure dramatically; instituting a new pricing strategy, logo, and corporate identity; implementing a fresh promotional strategy; improving the customer experience by updating merchandising and store presentation; and dramatically simplifying of the company's business model to match its new operational structure. The new plan seemed promising at first; JCPenney's stock price rose to $43.13 after Johnson announced his new transformation plan. However, after the first quarter, JCPenney's stock plunged 20 percent in its biggest decline in four decades. Six months into the transformation shoppers were still not responding to the changes that Johnson was making; at the end of the second quarter, JCPenney reported decreased sales in every category and a net loss of $147 million or $0.67 per share. Although only six months had passed since Johnson began the transformation, the board had sat idly by for six years while Ullman ran the company into the ground. Thus, the question was, would JCPenney's board of directors allow history to repeat itself or would it act – and, if so, how?

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: James Biteman, Tulane University, 7 McAlster Drive, New Orleans, LA 70118, 505-865-5459, jbite@tulane.edu

Entrepreneurship/Small Business/Family Business

Track Chairs:
Chris Cassidy, Sam Houston State University
Francine Schlosser, University of Windsor

	Bowden, Stephen.	Jucy Rentals
	Bowden, Stephen.	Nosh Food Market
	Cassidy, Christopher M.	Elizabeth Florer's New Project
	Reddick, Trace Liu, Yurong Krause, Eric Dwyer, Michael (Student Authors) Lawlor, K. Blaine (Faculty Supervisor).	MetaSpace Designs LLC: How Can a Lapel-ephant Stay Relevant?
	Rosenberg, Stuart.	Malkinson Printing Company: The Evolution of a Family Business
	Thurston, Paul W., Jr. Eddy, Erik R. Hartwick, Mary.	Mother Myrick's Confectionary
	Bazar, Gabit (Student Author) Whaley, George (Faculty Supervisor) Keith Perry (Faculty Supervisor)	Entrepreneurship at Mongol IS Tech, Inc.

JUCY RENTALS

Stephen Bowden
University of Waikato

Case Objectives and Use

The case looks at a brilliant entrepreneurial tourism business that has experienced significant growth through both diversification and internationalisation. While still very small by global standards and restricted in terms of capital, the founders are ambitious and opportunistic in their approach with a considerable track record of success. Opportunities are provided for a full strategic analysis including both external analysis and internal analysis and the development of recommendations. This case was originally used in a case competition environment and has subsequently been classroom tested. The case is suitable for a general strategy or entrepreneurship course as well as more specific courses on tourism management or business growth.

Case Synopsis

Tim Alpe, Chief Jucifier and co-founder of Jucy, contemplated the future of his rapidly growing company. Starting out renting cars in Auckland, in a short period of time Jucy had grown to be a major player in campervan rentals in New Zealand and Australia and had recently launched into the U.S. In New Zealand Jucy had also expanded beyond cars and campas to hotels and cruises. The world was full of exciting possibilities. The challenge was to prioritise opportunities to achieve the grand vision of an iconic global tourism brand.

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 peer reviewed for presentation at the North American Case Research Association (NACRA) for its annual meeting, October 17-19, 2013, Victoria, BC, Canada. Contact person: Stephen Bowden, Department of Strategy & Human Resource Management, University of Waikato, Private Bag 3105, Hamilton, New Zealand, 64-7-838-4472, sbowden@waikato.ac.nz

NOSH FOOD MARKET

Stephen Bowden
University of Waikato

Case Objectives and Use

The case looks at the challenge of creating and growing an alternative food store in a market dominated by two players. Retail tends to have scale advantages and food retail doubly so – how then does a small player compete? Opportunities are provided for a full strategic analysis including both external analysis and internal analysis and the development of recommendations. This case was originally used in a case competition environment and has subsequently been classroom tested. The case is suitable for a general strategy or entrepreneurship course as well as more specific courses on retail management or business growth.

Case Synopsis

Clinton Beuvink founded Nosh Food Market in 2006. By 2012 he had refined the concept and grown to six stores. But Beuvink wanted a step change. Food retailing was a capital intensive enterprise played by corporations with deep pockets. The two dominant players in New Zealand food retail, Foodstuffs and Progressive, dwarfed Nosh in the NZ$17.4B industry. Nosh aspired to a 5% market share, but was a long way off achieving that in 2012. Beuvink knew well that Nosh had to compete differently from the big players, but also knew that Nosh would remain very vulnerable while their scale was so small. The race to 5% was on, the question was how to get there.

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 peer reviewed for presentation at the North American Case Research Association (NACRA) for its annual meeting, October 17-19, 2013, Victoria, BC, Canada. Contact person: Stephen Bowden, Department of Strategy & Human Resource Management, University of Waikato, Private Bag 3105, Hamilton, New Zealand, 64-7-838-4472, sbowden@waikato.ac.nz

ELIZABETH FLORER'S NEW PROJECT

Christopher M. Cassidy
Sam Houston State University

Case Objectives and Use

This case re-examines the decision Elizabeth Florer made to invest in a Pita Pit Franchise one year later, and focuses on the choices she must make to ensure the viability of her investment. The case was developed for use in strategic management and entrepreneurship courses. The case objectives are to help students discuss and evaluate business concepts related to strategy and entrepreneurship such as: opportunity recognition, identification of core competencies, the development of human capital, the growth from an entrepreneurial start-up to a professionally managed business, and the alignment of mission, goals, and strategy.

Case Synopsis

Elizabeth Florer left her job as an international project manager at Sprint in 2012 and purchased a Pita Pit Franchise in Huntsville, TX. In April of 2013, about a year into her new career as a small business manager, she reflected on the decision to invest her retirement funds in a franchise and looked at the current state of her investment wondering, "Where do I go from here?"

Huntsville, Texas, is a small rural town with a large number of established and successful quick service food restaurants. Pita Pit is an international franchise with 142 Canadian, 170 US, and 24 international franchise locations. Pita Pit sells pitas, which are essentially equivalent to a sandwich in the region encompassing the middle east, north Africa, and the eastern Mediterranean. A pita is pocket bread stuffed with grilled meats and fresh vegetables. The Pita Pit franchise markets a Lebanese style pita with the tag line "Fresh Thinking and Healthy Eating". A focus on healthy Mediterranean recipes and ultra fresh vegetables separates Pita Pit from quick service restaurants selling burgers, chicken, and pizza, but sets it up to compete with Subways.

The author developed this Case for academic discussion of business theory and practice rather than to illustrate either effective or ineffective handling of the situation. The Case and Instructors Manual were peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, 17-19 October 2013. Contact Person: Christopher M. Cassidy, Sam Houston State University, Department of Management and Marketing, Huntsville, TX 77341-2056, 936-294-1975, cassidy@shsu.edu.

METASPACE DESIGNS LLC:
HOW CAN A LAPEL-EPHANT STAY RELEVANT?

Trace Reddick, Yurong Liu, Eric Krause, Michael Dwyer (Student Authors)
K. Blaine Lawlor (Faculty Supervisor)
University of West Florida

Case Objective and Use

The case, MetaSpace Designs LLC, is relatable and interesting to students as the company was started by a student who saw the potential in selling wares at jam band shows. Due to the impact of a rapidly changing environment in a growing industry, the case presents a robust look into a dynamic marketplace that is rife with newcomers and price fluctuations. The company's leveraging of web-enabled technologies and the market in which the company operates, combined with the company's small size lends itself to entrepreneurial interpretation. The primary use of the case would be in a MBA strategy or entrepreneurial class. However, it could also be utilized within an undergraduate strategy/policy class concentrating on several of the more salient features of strategy implementation, e.g. competitive strategy, customer relationship management, and international supplier relationships.

Case Synopsis

Edgar (Trace) Reddick started his small business, MetaSpace Designs, in 2008 by selling graphic t-shirts at a jam band concert in Atlanta. After getting more familiar with the jam band market, Trace learned that lapel pin sales were more profitable than sales of t-shirts. The company focused on selling band-inspired lapel pins in musical concert venues led and operated by only one person, Trace himself, through the period 2008-2013. As with any new opportunity, the market gained greater recognition as lapel pins grew in popularity. Further, market potential coupled with low-barriers to entry created an environment where MetaSpace struggled with a perpetual onslaught of new competitors. As a result, MetaSpace Designs stepped into business-to-business (B2B) sales in addition to sales to individual consumers (B2C). Armed with high quality products and services, Trace had achieved ever-increasing profits in all MetaSpace's served markets. However, obstructions, such as more competitors appearing in the market, ever more demanding customers, and upward price pressure by suppliers, created challenges for MetaSpace to survive and thrive within this marketplace. Customer relationship management, though a primary focus of the company, would not be the only thing to save MetaSpace from other players eating away at market share. In order to overcome these obstacles, Trace thought it was time to change the competitive strategy and to adapt his small company to survive in this dynamic environment. What should Trace do to take his one-person operation to the next level? Are there specific strategies that may help MetaSpace weather the chaos of a new market? Should Trace concentrate on B2B or B2C? Can MetaSpace Designs grow from a small company to a larger one with proper strategy implementation? Will Trace still be able to hang out at shows and have fun?

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: K. Blaine Lawlor, University of West Florida, 11000 University Drive, Pensacola Florida, 32514, 850-474-2277 blawlor@uwf.edu.

MALKINSON PRINTING COMPANY: THE EVOLUTION OF A FAMILY BUSINESS

Stuart Rosenberg
Monmouth University

Case Objectives and Use

This case helps to illustrate the importance of connecting the elements of dealing with a business with the various nuances of dealing with a family. While it is suitable for courses in Strategic Management, the focus of the case is on Small Business Management, and specifically, Family Business Management. The richness of the issues involved allows the case to be used in either undergraduate or graduate level courses.

The learning objectives of this case are: (1) to understand the requirements for starting and growing a small family business; (2) to examine the dynamics of the business as new family members are added; (3) to analyze the business' ability to respond to change; (4) to diagnose the complexity of sustainable business solutions; and (5) to evaluate the considerations involved in making a decision concerning the future of the business.

Case Synopsis

The three owners of Malkinson Printing Company, a fourth generation family-owned private printing company in Milwaukee, Wisconsin, needed to decide what to do about their struggling business. The company had always been a successful one, growing with each of its previous generations of ownership, but by the beginning of the 21st century, the printing industry had dramatically changed. The advent of computer graphics and desktop publishing made companies like Malkinson Printing irrelevant and its owners faced the challenge of sustaining its market.

The dynamics of the technological changes that were taking place dovetailed with a fracturing of the family dynamics at Malkinson Printing. Whereas their predecessors had always agreed on company strategy, the three family members in the fourth generation of Malkinson ownership – Brad Malkinson, Ron Malkinson, and Matt Decker – did not get along, and for the first time in its history, the survival of the company was at stake.

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 were peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19, 2013. Contact person: Stuart Rosenberg, Monmouth University, Leon Hess Business School, West Long Branch, NJ 07764, 732/263-5297, srosenbe@monmouth.edu

MOTHER MYRICK'S CONFECTIONERY

Paul W. Thurston, Jr., Erik R. Eddy, Mary Hartwick
Siena College

Case Objectives and Use

This case was prepared to describe a family owned business for use in either an undergraduate or graduate course on organizational strategy to illustrate the challenges facing small businesses and the importance of succession planning. The case explores the challenges involved with running a small, family-owned business, particularly as the proprietors reach retirement age. The case provides students an opportunity to practice the various techniques available to conduct situational analyses, identify strategic issues, evaluate alternatives and develop strategic initiatives. This case was most appropriate toward the middle or end of a strategy course, after students had learned about mission, vision, general strategies, and the various forms of internal and external situation analyses.

Case Synopsis

In 2013, Mother Myrick's Confectionery, located in Manchester Vermont had been owned, and continuously operated for 35 years by Ron Mancini and his wife Jacki. Over the years, they added an ice cream parlor and bakery, extended their product line and developed a mail order business. In 2005 they closed their downtown shop, shed the ice cream business and relocated the retail store to the edge of town. In the process, the company took on $205,000 in notes payable. The move reduced revenues, but increased their bottom line. Company revenues topped $800K for 2012 for the first time since they closed the ice Cream parlor. Ron thought about the balloon loan payment due on February 20, 2013. He had sufficient cash to pay it off, but that could leave him short in the fall when they were busy making product for the holiday season. Interest rates were still low, and they could probably borrow the money needed to pay off their existing debts and get additional capital to improve operations. Beyond the loan, Ron and Jacki had decisions about the company's future. They did not have children together, and Ron's children from his previous marriage had careers of their own. Ron wasn't sure whether any of the employees were ready to step up to take over the business. He could try to sell the organization outright. Taking on new debt now, however, would make the company less attractive.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Paul W. Thurston, Jr., Siena College, 515 Loudon Road, Loudonville NY 12210, 518.782.6864, pthurston@siena.edu.

ENTREPRENEURSHIP AT MONGOL IS TECH, INC.

George L. Whaley
(faculty supervisor)
San Jose State University

Gabit Bazar
(student author)
San Jose State University

Case Objectives and Use

The case was developed for undergraduate and graduate level courses in small business, entrepreneurship and organizational behavior. Additionally, the case setting is Mongolia and inter-cultural communications and global business classes could benefit from the global issues covered in the case. Since the decision focus is related to leadership styles and strategic product approaches, courses with modules in leadership, strategic planning, conflict resolution and human resource management could benefit from this case.

Case Synopsis

President, Ganaa Baagii and the CEO, Naran Buya were responsible for leading the discussion in the 2012 annual year end meeting with all employees. The company started in 2007 as a contract software developer in an immature Mongolian software industry and the external and internal environments rapidly changed. In 2011, the product strategy emphasis changed from contracting and off-shoring to building their own brand and this change caused internal workload and talent management issues. Mongol IS Tech (MIST) was profitable the last two years, but uncertainty followed its sustainable growth path. Recently, the employee turnover rate increased and management wondered whether it was due to the strong Mongolian cultural influences or MIST top management's leadership style. The case ends with Baagii mulling over the intended meeting focus: profitability of the company, talent management issues related to increase in number of employees and the product development strategy of the upcoming year.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: George L. Whaley, San Jose State University, One Washington Square, Lucas College of Business, San Jose, California, 95192-0070, 408-924-3564, george.whaley@sjsu.edu.

Marketing and Managing Here and Abroad

Track Chairs:
Javier Silva, IAE Business School
Josep Franch, ESADE

	Ahmed, Irfan Warner, Janis.	A Matter of Life and Death
	Calatrava, Gustavo Silva, Javier	The Heart Attack Grill (A, B & C)
	Davis, Brad Rose, David	Graf Hockey
	Franch, Josep Walter, Florian Cuneo, Andres.	The Fluidra Branding Challenge: Reduce Complexity or Respect Diversity?
	Franch, Josep Kondratieva, Marianna Sablina	Roca in Egypt
	Hertrich, Sylvie Mayrhofer, Ulrike	Audi, Aiming to Become the World's Leading Premium Car Brand
	Kinnunen, Raymond Spiess, Dan Sieloff, Susan	City Branding and Marketing: Dublin, Ireland's Investment in its Future
	Krusekopf, Charles Stephens, Hugh.	The Cable and Satellite Broadcasting Association of Asia: Protecting Intellectual Property in the Developing World
	Lawrence, John McCollough, Michael	The Big Ten Heads East
	Oppenheimer, Daniel.	Hasbro: Dungeons and Dragons 5th Edition
	Peters, Susan D. Shin, Yong B	Physics for your Phone
	Rubin, Jeri Ahmed, Irfan	Hide and Skin: An Alaska Tannery Conundrum
	Sieloff, Susan F.	Paradise Isles Lobster Co-op

A MATTER OF LIFE AND DEATH

Irfan Ahmed and Janis Warner
Sam Houston State University

Case Objectives and Use

The purpose of this case is to provide a challenging, hands-on learning opportunity for marketing/advertising students to develop a social media campaign for a critical yet resource-strapped not-for profit cause. The case can be used in undergraduate or graduate level courses on advertising and promotion, social media, or non-profit marketing. Students can be required to develop a complete social media campaign, beginning with strategy definition, creative and media planning, and simulated execution, depending on the level of the course and other content being covered and time available. The case could also be used as a platform for a semester long project course for senior-level undergraduate students, as well as for case a case competition, with competing teams preparing a report and making a presentation. While some parts of the case (e.g., target market definition, statement of objectives) may lend themselves to class discussion, others (e.g., media evaluation and planning, and creative plan development) would require out-of-class research and analysis.

Case Synopsis

This case deals with planning a social media campaign in a resource-strapped, non-profit setting. Courtney Carroll, a teenager living in The Woodlands, Texas, had been diagnosed with IgA Nephropathy, a complex blood disease that affects the kidneys and can cause renal failure over time. As of June 2012, Courtney was in need of a living kidney donor. Tami Carroll, Courtney's mother, faced the task of expediting the search for a living kidney donor to allow Courtney to live a healthy life, and before Courtney's insurance coverage ran out in a few years. Tami had been planning to harness the power of social media in her efforts, and had contacted Dr. J.W., a professor of business, to help her. Together, Tami Carroll and Dr. J.W had to develop a social media strategy and plan to help find a living kidney donor for Courtney.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Irfan Ahmed, Sam Houston State University, College of Business Administration, Huntsville, TX 77341, (936) 294-1276, irfanahmed@shsu.edu.

THE HEART ATTACK GRILL (A, B & C)

Gustavo Calatrava and Javier Silva
IAE Business School – Universidad Austral

Case Objectives and Use

This case is divided in three parts: A, B & C, available in paper and multimedia versions.

Cases "A" and "B" are intended to introduce/review the basic components of the marketing mix to gain a better understanding of how important their consistency is for business growth. This analysis leads students to understand the root causes of restaurant's success and define which decisions will be critical to ensure business growth in the future.

Case "C" intends to prompt a debate on the appropriate/inappropriate use of marketing tools (fat-packed products, questionable communication ethics, etc.), ultimately dealing with issues associated with leadership and corporate social responsibility.

On account of its simplicity, this case may be used in graduate (MBA, EMBA), executive education as well as in undergraduate programs.

Case Synopsis

In mid 2012, Jon Basso, The Heart Attack Grill (HAG) founder and owner, wondered how his successful restaurant, recently relocated to Las Vegas, Nevada, should move forward. With a limited menu and a straightforward, flavor-oriented proposition, Basso created a theme restaurant (like Planet Hollywood or Hard Rock Café) based on an amazingly consistent marketing mix that was readily welcomed by a growing clientele. What had been his key success factors / competitive advantages? How should he continue to grow his business?

Against the grain of all modern healthy food trends, Basso turned the search for taste into a self-gratifying cult, offering calorie-packed meals. His business idea stirred mixed reactions –mostly negative- in the media, fueling a debate that spanned issues ranging from individual freedom to unhealthy habits and the morals involved in the use of marketing tools. As the controversy grew in the media, Basso and his restaurant advertised their business in the local, national and international press for free. Was Basso's behavior appropriate or morally reprehensible?

This case aims at developing knowledge on: positioning, differentiation, small business, restaurant services, value proposition, marketing ethics and social responsibility.

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 synopsis were peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Gustavo Calatrava, IAE Business School, Austral University- Mariano Acosta s/n Ruta Nac. 8 (B1629 WWA) Pilar – Buenos Aires - Argentina, Tel. (54) 230 4481080 gcalatrava@iae.edu.ar

GRAF HOCKEY

Brad Davis
Wilfrid Laurier University

David Rose
Wilfrid Laurier University

Case Objectives and Use

The Graf Hockey case can be used in an introductory marketing, marketing strategy or brand management course at the undergraduate, MBA or executive MBA level. The case is set in the hockey equipment market focusing on a brand seeking to increase its market share in the face of two dominant brands. The case is intended to develop skills in brand positioning. Faced with limited resources, students must identify a sustainable brand position and consider how to secure that position in the marketplace as a platform to increase market share. The case places students in a situation where they must identify innovative marketing tactics to compensate for a lack of marketing resources.

Case Synopsis

The case is set in the hockey equipment market moving into 2012. Graf Hockey Canada appointed a new chairman and vice-president of sales & marketing. Their goal is to increase market share to 20%. However, the market is mature so growth will have to come at the expense of competitors. The market is dominated by two powerful companies: Bauer and CCM/Reebok. Graf has a good reputation for producing high-end skates but has now moved into lower price points in an effort to extend their market offering. They have developed a product that has superior fit and comfort compared to other skates in the marketplace; however, the trend has been towards lighter skates. Although better fitting and more comfortable – which means less risk of developing heel and ankle problems – Graf skates are heavier than their competitors. Graf must ensure that their core competency is also a competitive advantage.

With only a fraction of the budget of the industry leaders Graf management must develop cost-effective innovative marketing tactics to increase their market share. They must also make decisions regarding their product line. With the skate market maturing, Graf will need to build a much stronger presence in other product categories (EG. hockey sticks, protective equipment) if they are to achieve their growth target. Decisions need to be made on how to increase their sales in these product categories while remaining consistent with their brand image and positioning.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victory, British Columbia, Canada, October 17-19, 2013. Contact person: Dr. Brad Davis, Wilfrid Laurier University, 75 University Avenue, Waterloo, Ontario, Canada. N2L 3C5. 519.884.0710 x2539, bdavis@wlu.ca

THE FLUIDRA BRANDING CHALLENGE: REDUCE COMPLEXITY OR RESPECT DIVERSITY?

Josep Franch, Florian Walter, Andrés Cúneo
ESADE Business School

Case Objective and Use

The Fluidra Branding Challenge case study has been designed for use in an International Marketing or a Global Marketing course. Alternative uses of the case (not developed in these Teaching Notes) might be in courses on Brand Management, International Business or even Organizational Design.

It is recommended for advanced rather than basic or introductory courses. This case could be used for various target audiences: MSc students, MBA students from various backgrounds and with greater or lesser experience (Full-Time, Part-Time or Executive MBA formats) and participants of various kinds of Executive Education program. The case is, however, unsuited for undergraduate students unless they happen to be in the final year of their studies (and are preferably marketing majors).

The main learning objectives of this case study are to assess the current brand architecture of Fluidra and identify its main problems; to identify and discuss the possible brand strategies and alternative brand architectures; to foresee the implications of changing the brand architecture and find ways of dealing with the consequences; and to become aware of implications in the company structure and organization of any international and global branding decisions

Case Synopsis

David González, General Manager for Marketing and Business Development at Fluidra, had to review the company brand architecture. Fluidra was a multinational company listed on the Spanish Stock Exchange, specializing in developing applications for water conservation, handling, treatment and enjoyment. At the end of 2011 the company was directly present in 33 countries and had a sales turnover of over $800 million, selling 90,000 SKUs to over 35,000 customers worldwide in 170 countries.

Although the company was present in various markets — pool and wellness, water treatment, fluid handling and irrigation — the swimming pool residential market was the company's mainstay and was one in which Fluidra was the market leader. Since its foundation in 1969, Fluidra had used all different kinds of growth strategies: diversification; organic growth; greenfield investments and acquisitions. Over the years, the company had over the years a portfolio of some forty brands, some of which were competing against others.

After gaining public listing in 2007, Fluidra came under financial analysts' spotlight. Pressure built to improve performance and greater stress was put on efficiency. The main issue facing the Board of Directors was the need to overhaul the brand architecture. The dilemma was whether to reduce complexity or to respect diversity.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Josep Franch, ESADE Business School, Av. Torre Blanca 59, 08172 Sant Cugat del Vallès (Barcelona), Spain, Tel. +34 932 806 162, e-mail: josep.franch@esade.edu

ROCA IN EGYPT

Josep Franch
ESADE Business School

Marianna Sablina Kondratieva
ESADE Business School

Case Objective and Use

The *Roca in Egypt* case study has been designed for use in an International Marketing or a Global Marketing course. Alternative uses of the case (not developed in these Teaching Notes) might be in courses on Marketing Communication or Advertising.

It is recommended for advanced rather than basic or introductory courses because some knowledge of different managerial topics is required — not only of basic marketing concepts, communication and advertising but also of cross-cultural issues and international business:

This case could be used for various target audiences: MSc students (for example, those taking an MSc in International Management or in International Business, MSc in Marketing Management), MBA students from various backgrounds and with greater or lesser experience (Full-Time, Part-Time or Executive MBA formats) and participants of various kinds of Executive Education programs. The case is, however, unsuited for undergraduate students unless they happen to be in the final year of their studies (and are preferably marketing majors).

These teaching notes have been designed for using the case in a session on International Communication and Advertising, usually scheduled at the end of the course. The main learning objectives of this case study are to assess how an unstable political environment can affect a brand's entry and growth strategies; to evaluate the feasibility of rolling out a global advertising campaign versus a localized advertising campaign; and to discuss how to convince a local marketing team of the need to be aligned with a global marketing campaign.

Case Synopsis

In late March 2012, Carlos Velázquez, Corporate Marketing Director for the Roca Group, and Xavier Torras, Corporate Brand and Communication Director for the same company, were visiting Gravena, their partner company in Cairo (Egypt).

Roca, worldwide leader in the bathroom industry, was a Spanish family-owned multinational company present in over 135 countries. The company had entered Egypt in late 2009, acquiring a 50% stake in Gravena, an Egypt-based manufacturer of bathroom products. The plans for launching the Roca brand in Egypt had been put off for over a year following the outbreak of The Arab Spring.

The managing team at Gravena wanted to go ahead with the launch but senior management at Roca headquarters wanted to postpone a decision. Velázquez and Torras went to Cairo to meet the Gravena team on the spot and assess the situation. Upon their arrival. they found the local team not only as keen as mustard to go ahead with the launch but also enthusiastically defending a high-impact advertising campaign based upon gags that had nothing to do with the Roca brand values.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Josep Franch, ESADE Business School, Av. Torre Blanca 59, 08172 Sant Cugat del Vallès (Barcelona), Spain, Tel. +34 932 806 162, e-mail: josep.franch@esade.edu

AUDI, AIMING TO BECOME THE WORLD'S LEADING PREMIUM CAR BRAND

Sylvie Hertrich
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Ulrike Mayrhofer
IAE Lyon, Lyon University

Case Objectives and Use

Prepared in close cooperation with the General Manager of the French subsidiary of Audi, this case presents the strategy developed by Audi to conquer international markets. It provides detailed information about Volkswagen group, the Audi Company and recent changes in the global automobile industry. Students are asked to analyse choices made by Audi for the internationalisation of its activities and to formulate recommendations concerning the future development of the company in China.

The case can be used for a course on international management, strategic management or international marketing. It is adapted for students in business schools and universities (initial and executive education). The objectives of the case are to:

- familiarize students with the characteristics of the global automobile industry,
- make students aware of the internationalization process of activities:
- prepare an analysis of the situation of the company on international markets
- evaluate the choice of entry modes on foreign markets,
- analyze the location of international activities,
- formulate recommendations for the future strategic orientations of a company.

Case Synopsis

The German company Audi, part of the Volkswagen Group, was enjoying unprecedented levels of success, particularly in the international marketplace. In 2012, over 1.45 million Audi brand vehicles were delivered to customers worldwide. In the same year, the company's sales turnover stood at 48.8 billion Euros, and net profit was 4.4 billion Euros. The company had become one of the world leaders in the 'premium' car segment where it competed against other German companies like BMW and Mercedes (Daimler Group). Audi developed a differentiation strategy mainly based on the technology and quality of the services it offers. This strategic positioning was manifested by the slogan *'Vorsprung durch Technik'* (*progress through technology*), which emphasises the country of origin of the company - "Made in Germany". The slogan was used by the brand in its communication campaigns throughout the world.

Over the past decade, Audi significantly reinforced its presence in the international marketplace. In 2012, Audi's foreign sales reached 1.19 million vehicles, or 81.9% of the brand's sales. Audi was the absolute first car company to enter the Chinese market in 1988. By comparison, BMW didn't come to the Chinese Market until 2003, giving Audi a 15-year head start. The company aimed to become the global leader in the "premium" segment, overtaking its two major competitors BMW and Mercedes. It intended to pursue the international development of its activities and to produce 1,5 million vehicles in 2015.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Sylvie Hertrich, Université de Strasbourg, EM Strasbourg, 61, avenue de la Forêt-noire, 67000 Strasbourg, France, Phone: 00.33.3.88.98.80.58, sylvie.hertrich@em-strasbourg.eu.

CITY BRANDING AND MARKETING – DUBLIN, IRELAND'S INVESTMENT IN ITS FUTURE

Ray Kinnunen, Dan Spiess, and Susan Sieloff
Northeastern University

Case Objectives and Use

The case is based on interviews and related secondary research. It is appropriate for courses in Business Marketing as well as Urban and Regional Policy at the undergraduate, graduate and executive levels. Students of Business Marketing and Urban and Regional Policy should gain an understanding of:• The role of analysis in both the business and urban policy framework.• The pros and cons of policy and investment decisions from the view of various stakeholders.• Understand the economic and policy impact of branding and marketing efforts.

Case Synopsis

For cities in Ireland, the economic upheaval of the recent recession may have been almost too much to bear, but Dublin recognized that it had unique characteristics that other cities could only hope for: its innovative technology sectors were still strong and it was the home to the European headquarters for Facebook, Google and Twitter among others. The challenge for Dublin was to figure out how to use the recession period to regroup and prepare for when the economy would rebound.

In February 2010, Dublin City Council began to look at a major branding effort to define a vision and identity for the city that was realistic, compelling and competitive internationally. It was also meant to be supported, reinforced and enriched by every act of communication between Dublin's stakeholders locally, nationally and globally. Dublin already had a strong brand and ranked highly in terms of business relocation, foreign direct investment and quality of workforce.

There were risks either way. Dublin City Council members could stop the branding process, which cost nothing due to pro bono work, and continue to ride their current global brand which brought in Facebook and Google. Or Council members could decide to spend hundreds of thousands of dollars to broaden and strengthen their brand in order to bring in even more business and truly compete on the global stage. The city branding strategy had the potential to align national, regional and city efforts, leverage greater foreign investment, spur RD&I funding and at just a fraction of the cost of larger efforts in other cities. The risk to consider was that a bad city branding strategy might negatively impact all of the elements that created Dublin's strong reputation to begin with and dismay citizens during tough economic times.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013.

THE CABLE AND SATELLITE BROADCASTING ASSOCIATION OF ASIA: PROTECTING INTELLECTUAL PROPERTY IN THE DEVELOPING WORLD

Charles Krusekopf
Royal Roads University

Hugh Stephens
Royal Roads University

Case Objectives and Use

This case, appropriate for advanced undergraduate or masters students studying international business, international political economy, or international law, focuses on an issue related to intellectual property rights, with an emphasis on an international context. It profiles the challenges media companies face when selling content in developing countries. It outlines key stakeholders in business and government who are engaged in IPR issues, and some of the international and domestic legal rules and organizations related to IPR, including the World Trade Organization and US Trade Representative. It highlights the challenges companies face in attempting to enforce legal IPR rights inter-nationally, and alternative means that companies can use to insure that their legal rights are recognized and protected. The case provides an example of the development and use of an advocacy coalition framework built on stakeholder analysis. The case incorporates Freeman's stakeholder theory in identifying key stakeholders, their interests and means of leverage, and the work of Weible and Sabatier in the construction and understanding of advocacy coalition frameworks and stakeholder analysis.

Case Synopsis

John Medeiros, VP Policy of Hon Kong-based industry trade organization Cable and Satellite Broadcasting Association of Asia (CASBAA) was tasked by his members to develop a strategy to deal with the growing problem of signal piracy in the Philippines. CASBAA was an organization of 125 companies involving all elements of the pay television industry in Asia including some major multinational content and broadcasting companies. Among CASBAA's key objectives was the protection of the intellectual property of its members. A major problem facing the industry was that of signal piracy where unauthorized distributors retransmitted their signals (content) to subscribers without paying negotiated license fees for the use of the content. This was a growing problem costing the industry more than $1 billion per year in the region in which it operated, according to CASBAA estimates. A major problem existed in the Philippines, where piracy was had cost the industry more than $85 million in 2007. CASBAA had already pursued legal options to curtail piracy in the Philippines with limited success and John was asked to propose a strategy that did not involve expensive litigation. John planned to build an advocacy coalition to pressure the Philippine government to enforce its own IPR laws and meet its obligations under international treaties. To do so, he sought to identify the key decision makers within the Philippine government, and the key stakeholders both in the Philippines and abroad who might support actions to shut down signal piracy in the Philippines. He needed to understand the interests of these key decision makers and stakeholders, and develop both reasons and ways for them to act. His overall goal was to develop an advocacy coalition composed of the public and private stakeholders that might be concerned about signal piracy in the Philippines, and to develop a plan for how to effectively utilize his coalition to achieve the outcome desired by his member companies: a reduction of signal piracy.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Charles Krusekopf, Royal Roads University, 2005 Sooke Rd., Victoria, BC V9B5Y2, Tel. 250-391-2600 x4421, charles.krusekopf@royalroads.ca.

THE BIG TEN HEADS EAST

John J. Lawrence
University of Idaho

Mike McCollough
University of Idaho

Case Objectives and Uses

The case was developed for use in an undergraduate or graduate level marketing strategy course and would also be appropriate for sports management or sports marketing courses. The case was written to illustrate both cooperative strategies and branding issues, and therefore could be used in more than one class session. The case will help students understand the strengths of cooperative strategies, in this case a Joint Venture (JV) in a "non-profit" setting. Through evaluating the decisions to add Rutgers and Maryland, as well as consideration of possible future additions to achieve "super-conference" status, the case helps students understand how to select criteria to use to form or expand a JV. The case also illustrates the branding challenges as the Big Ten moves to fourteen members (e.g., adding alliance members with weaker brands than many existing alliance members; having a strong brand name that is out of step with conference characteristics) and help students learn how to address these challenges. Finally, the case explores the impact of cable TV and audience segmentation on the actions of organizations in a digital age. Students will learn how to use segmentation concepts to assess the value of market expansion strategies and inform alliance membership decisions. The focus on the Big Ten athletic conference provides a context that undergraduate students in particular should find fun and approachable. The case is intended primarily for use in the United States give its focus on college sports that lacks a parallel in non-US settings.

Case Summary

This case focuses on the fall 2012 additions of Rutgers (The State University of New Jersey) and the University of Maryland to the Big Ten athletic conference. At the time the expansion was announced it was largely panned by sportswriters, fans and pundits. The case describes the recent history of the conference, the decision and motivations to add Rutgers and Maryland, and the reactions of Big Ten officials and sportswriters to the move. The case also describes the Big Ten's TV deals, both with major networks and through its own Big Ten Network, and the possible financial implications that the additions could provide as a result of increased relevance of Big Ten sports to the New York, Baltimore and Washington, D.C. television markets. The case concludes by asking students to both evaluate the decision to add Rutgers and Maryland and to develop recommendations for what comes next (e.g., how should Maryland and Rutgers be integrated into the conference, should the Big Ten consider rebranding to support the move, should the Big Ten move quickly toward a 16 team super-conference structure,) The case provides an excellent opportunity to discuss cooperative strategies, branding, and market segmentation issues in a nontraditional and fun context that the students may more readily relate to than the more typical cases involving large, complex international business organizations.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: John J. Lawrence, University of Idaho, Department of Business, 875 Perimeter Drive MS 3161, Moscow, ID 83844-3161, 208-885-5821, jjl@uidaho.edu.

HASBRO:
DUNGEONS AND DRAGONS 5TH EDITION

Daniel M. Oppenheimer
University of California Los Angeles

Case Objectives and Use

This case would be most appropriate for an introductory marketing strategy course for MBAs or undergraduates. The case is particularly useful as a case on segmenting and targeting, particularly with respect to how it affects tactical decisions. Crucially, the case lends itself to fundamentally different tactics depending on what segment is targeted, allowing for a clear illustration of why the four P's (pricing, promotion, product, and place/distribution) are so reliant on strategic considerations.

The case also is useful for discussions about product development. Many cases on 'product' intended for introductory marketing strategy courses focus on branding. For this case, product analysis focuses on developing products that align with marketing strategy (i.e. targeting and positioning), rather than developing the brand. For instructors looking to run a case on tactical decisions regarding products for a marketing strategy course, this case can fill that niche.

Case Synopsis

Since 1974, millions of groups of friends have gathered to play Dungeons and Dragons (D&D) – a roleplaying game that has been the market leader since it first hit shelves. But in 2011, D&D ceased to be the highest selling game in the genre. And the executives at Wizards of the Coast, and their parent company Hasbro, wanted to re-emerge as the dominant player in the market.

It was easy to diagnose what had gone wrong. Three years earlier, in 2008, the 4th edition of D&D had been released, and it had not been popular. Long time loyalists had abandoned the brand by the thousands. Wizards of the Coast had to figure out how to stem the bleeding. As they began the development of a new, 5th edition of D&D, in January of 2013, Wizards CEO Greg Leeds had a number of questions for the marketing department, ranging from the product itself, to promotion, pricing, and distribution channels. It would not be easy to become a market leader again, but the company was confident that if they made the right marketing decisions, they would be able to be successful.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Danny Oppenheimer, UCLA, 110 Westwood Plaza, Gold Hall 4.23, Los Angeles, CA. 310-825-1648, Daniel.oppenheimer@anderson.ucla.edu.

PHYSICS FOR YOUR PHONE

Susan D. Peters
Francis Marion University

Yong B. Shin
Francis Marion University

Case Objectives and Use

The most likely use of this course is in an undergraduate Consumer Behavior class, although it could be used in other classes using decision making models. Learning objectives include reinforcement of price and cost/benefit concepts, application of consumer behavior decision models, interpretation of the results of these models, and understanding the implications of these results

Case Synopsis

Daniel Jacobs, a young college professor wants to sell some physics smart phone apps his students have created. Due to university restrictions, he must select one or possibly two apps and is looking from some help from his university's Center For Entrepreneurship and it's director, Petra Bell, in making the best marketing choice.

The case focuses on consumer decision making models. While the models will illustrate different choices, the questions below should lead them to understand that a "live" consumer decision for a phone app is likely to be less structured. Some questions also expand into value and cost/benefits concepts.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19, 2013 Contact person: Susan D. Peters, Center For Entrepreneurship, Francis Marion University, P. O. Box 10547, Florence, SC 29502-0547, 843 661 1102, speters@fmarion.edu

HIDE AND SKIN:
AN ALASKA TANNERY

Jeri Rubin
University of Alaska Anchorage

Irfan Ahmed
Sam Houston State University

Case Objectives and Use

The objectives of this case are to enable students to formulate a market segmentation analysis, develop an industry attractiveness analysis for a tannery and crafts business, and to use the results to help develop a positioning strategy. The case will also provide an opportunity to identify the workings of a small business, and recognize its intricacies and vagaries. The case is suited to use in undergraduate or graduate level courses on management/marketing strategy, small business and/or not-for-profit management.

Case Synopsis

The case deals with the expansion plans of Shishmaref Traditional Industries (STI), a tannery and crafts business operating in Shishmaref, Alaska. STI custom tans furs and hides and retails tanned furs and hides as well as finished fur and hide products. STI is facing an uncertain market, an unreliable supply chain, and dated machinery that inhibits its ability to excel in its business. STI has made a decision to seek funding for new machinery and facilities expansion. However, the protagonists are faced with the task of improving their understanding of their market and understanding its potential before they can undertake the costly and irrevocable decision of a major facilities expansion. Based on preliminary market research conducted on their behalf by consultants from the Small Business Administration, they have to comprehensively profile and segment their market and decide on a positioning strategy for their business.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Jeri Rubin, University of Alaska Anchorage, College of Business & Public Policy, Anchorage, AK 99504, (907) 786-4155, jgrubin@uaa.alaska.edu.

PARADISE ISLES LOBSTER CO-OP

Susan F. Sieloff
Northeastern University

Case Objectives and Use

The case encourages students to apply the fundamental concepts of marketing to develop a complete marketing plan for a small, resource-constrained organization and is appropriate for undergraduate and graduate courses in marketing, marketing management and marketing strategy.

The case can be used to focus students on either on the basic background analysis required for good marketing plans (situational analysis and key success factors), or to develop strategic options and tactical implementation plans, based on the background situation and information.

As part of the case analysis, students should:

- Evaluate the available information in the case and determine the need for additional information (if permitted by instructor).
- Synthesize the macro and micro environment affecting the Co-op's ability to respond, demonstrating understanding of how to develop a situational analysis in marketing.
- Develop options to address the issue defined in the situational analysis.
- Develop a complete marketing plan tailored to the needs and resources of the Co-op.
- Support a recommendation with both quantitative and qualitative reasoning.

Case Synopsis

Tom Davis is a lobsterman with the Paradise Isles Lobster Co-op of Paradise Isles, Maine. After a year (2012) in which a record lobster harvest was landed driving prices for lobster to equally record lows, the Co-op was seeking input regarding how to increase the dividends to the Co-op members, all of whom were active lobster fishermen. The Co-op had limited marketing experience and, as Tom said: "Doesn't know what we don't know", but was open to suggestions to improve profitability. The case provides information for students to develop both a complete situational analysis and a marketing plan to address the situation.

The author developed this case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note were peer reviewed for presentation at the NACRA 2013 Conference, Victoria, British Columbia, Canada, October 17-19, 2013. Contact person: Susan F. Sieloff, Northeastern University, 202 Hayden Hall, 360 Huntington Avenue, Boston, MA 02115, 617-373-4638, s.sieloff@neu.edu.

Processes, Projects, and Technologies

Track Chairs:
Javier Busquets, ESADE
Joan Ramon Mallart, ESADE

	Bair, Nathan Van Kampen, Jennifer Powsner, Hilary (Student Authors) Levenburg, Nancy (Faculty Supervisor)	Grand Rapids Police Department: Fleet Management and Best Practices
	Busquets, Javier Alvarez, Conxita	Banco Sabadell acquires Banco CAM: leveraging Cloud Computing Strategy
	Busquets, Javier Domingo, Josep Lluis Mallart, Joan Ramon	Roca Group: The Global Governance Challenge
	Corrales, Martha Aguirre, Alvaro.	Alestra: Innovation as a Process and Strategy for Growth
	Eshbach, Lisa Levenburg, Nancy M.	Royal Beginnings: Supply Chain Decision Making in a Bridal Shop
	Lewis, Mark O Hayward, Scott Baxter, Ryan	Architecting a Sourcing Strategy: The Peril of One and the Downside of Many at Atlantico.
	Maksimtsev, Igor Cherenkov, Vitally.	From Ares to Asklepios-Sharp Marketing Strategy Bend of “Pulse Systems Group” (Saint Petersburg, Russia)
	Newton, Sandra Gilinsky, Jr., Armand	Nakedwines.com: The Sudoko Approach

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EASYPAISA

Dr. Nasir A. Afghan
Institute of Business Administration, Karachi

Author unable to attend NACRA 2013; eligible to submit case to a future NACRA conference.

GRAND RAPIDS POLICE DEPARTMENT: FLEET MANAGEMENT AND BEST PRACTICES

Nathan Bair (student author)
Grand Valley State University

Jennifer Van Kampen (student author)
Grand Valley State University

Hilary Powsner (student author)
Grand Valley State University

Nancy Levenburg (faculty supervisor)
Grand Valley State University

Case Objectives and Use

This case was written for graduate-level Operations Management students or those enrolled in a course in which sustainability is a major theme. It focuses on the many factors that go into acquiring new equipment and implementing a new business system. In this case the factors for decision making are environmentally-based, cost-based, and quality-based. It is important that students can perform breakeven analyses to provide financial data to support their recommendations; they must also consider the city's environmental criteria and the needs of the users – in this instance, police officers – and not let the dollars be the sole determining factor. Upon completion of this case, students should be able to synthesize both the emissions data and cost data into an implementable plan for greening the police fleet, calculate the best fleet option by performing a breakeven analysis (traditional sedan vs. hybrid sedan), and evaluate optimum fleet makeup using rightsizing practices.

Case Synopsis

Rupert Griffin, an intern for the city of Grand Rapids' Facilities and Fleet Management department, has been tasked with developing a plan to green the City's police fleet. The department wants to reduce its fuel emissions, fuel cost, and maintenance costs. Reducing fuel emissions and departmental costs will be a joint effort of better training the officers who drive the cars and selecting cars that meet the city's sustainability goals, as outlined in the Grand Rapids Green Fleet Plan (see case exhibit 1).

The police fleet makes up 12 percent of the City's total fleet of vehicles. For the initial green fleet implementation, the department plans on replacing the patrol vehicles. To help him with comparisons, Rupert had access to data from the New York City police department and the Washington D.C. police department, both of which recently implemented hybrid and electric cars to green their respective fleets. Rupert (and students) must compare the cost, emissions, and fuel usage for a traditional Ford police cruiser and a Ford Fusion hybrid sedan. It is his responsibility to compare the two options and develop a report to present to his boss so that the final decision can be made.

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 peer reviewed for presentation at the NACRA 2013 conference, Victoria British Columbia, Canada, October 17-19 2013.

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BANCO SABADELL ACQUIRES BANCO CAM: LEVERAGING CLOUD COMPUTING STRATEGY

Javier Busquets AND Conxita Alvarez
ESADE Business School, Universidad Ramon Llull, Barcelona

Case Objectives and Use

This case demonstrates how digital plataforms and cloud computing can be seen as a core competence within a bank's growth strategy through M&A. First, we assess Information Technology (IT) value and its alignment with the firm's growth strategy. Second, we explore project design, and political issues to implement Cloud Computing. Lastly, we address the role of the CIO. The case was written for General Management and Senior Executive Programs and can also be used in an MBA course in Information Systems Strategy. Students are asked to understand project success/failure issues, costs of change and what decisions led to one situation or another and understand the development of a new strategy based on cloud computing.

Case Synopsis

The case examines IT-related decisions in 2012 related to Banco Sabadell's acquisition of Banco CAM. Banco Sabadell management expected € 331 m in synergies from 2012 to 2014 since efficiency ratios showed potential for this deal. In the context described, speed was critical, making this operation the most challenging in the bank's history. Prior to the merger Banco Sabadell had 1,340 branches and 2.5 million customers. BCAM was of a similar size, with 2.5 million customers, 939 branches and €71.3 billion assets. Banco Sabadell had grown by acquiring seven banks in Spain and four in the USA from 2003 to 2011. Its core banking platform (PROTEO) and IT-based methodologies were critical elements in that growth.

Students need to understand the risks involved in such a large acquisition, especially considering that CAM's risk portfolio was estimated at €24 billion. The case focuses on Miquel Montes, former CIO and promoted to CEO in Banco CAM. Students are asked to understand Montes' and his team's perspective to leverage critical IT resources and a new cloud computing strategy based on the deployment of thin-client in Banco CAM branch offices. Students are also challenged with the strategy in Information technology (IT) to prepare a specific plan to integrate BCAM, since the President of Banco Sabadell, Josep Oliu had announced in an 8 December 2011 press conference that BCAM must be integrated before the end of 2012.

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 peer reviewed for presentation at the NACRA 2013 conference, Victoria British Columbia Canada, October 17-19 2013. Contact person: Javier Busquets, ESADE, Xavier.busquets@esade.edu .

ROCA GROUP:
THE GLOBAL GOVERNANCE CHALLENGE

Javier Busquets, Josep Lluis Domingo, Joan Ramón Mallart
ESADE Business School, Universidad Ramon Llull, Barcelona

Case Objectives and Use

The primary argument in “Roca Group: The Global Governance Challenge” is how new management may face cultural barriers in IT governance and global IT projects Different aspects of this idea are explored: first, we assess Information Technology (IT) value and its alignment with the firm’s growth strategy; second, we explore project design and political issues to implement IT; and, third, the role of the CIO. The case was written for General Management and Senior Executive programs and can also be used in MBA and Executive MBA courses in Information Systems Strategy. Students are asked to understand project success/failure issues, costs of change and what decisions led to one situation or another and understanding the development of a new corporate governance model

Case Synopsis

“Roca: the IT Global Governance Challege” is a case about global governance at corporate and IT levels. The case describes Impulse project from 2004 and 2012 associated to the renewal of information systems and implementation of a new IT Governance Model in Roca Worldwide. Roca, a € 1.500 m firm, is number one worldwide for sanitary ware. The aim of the Impulse project was to redefine global productive, administrative and logistical processes and prepare the firm for growth through possible purchases (M&A) of other companies. The objective of the project was to replace a large number of legacy systems coming from previous M&A, introducing a new corporate SAP system and a global IT governance model.

Roca hired a new CIO in 2004, someone from “outside” the firm, to professionalize this processes, but results in 2010 were far behind expectations. The Board decided to fire that CIO and “replace” him by Pau Abelló, from the Finance Department. Students need to realize that some members of the management committee thought it was best to find a new CIO on the market, others believed that they should look for someone from “within the company” (something students need to realize behind the lines). The hook in the cases is presented when Mr Sunday (CFO), who had been Abelló’s boss for 8 years, offers informally the new CIO position to Abelló. If Pau Abelló accepted, it was clear that they would be choosing someone who knew the corporate culture but was perhaps inexperienced in IT systems. This is the dilemma the case presents from a corporate and IT governance perspectives. The case can be discussed as well from three perspectives (1) From Pau Abello’s decision making processes; (2) from “the board” perspective.

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 peer reviewed for presentation at the NACRA 2013 confernce, Victoria British Columbia Canada, October 17-19 2013. Contact person: Javier Busquets, ESADE, Xavier.busquets@esade.edu .

ALESTRA:
INNOVATION AS A PROCESS AND STRATEGY FOR GROWTH (A) (B)

Martha Corrales
EGADE Business School, Tecnologico de Monterrey

Alvaro Aguirre
ALESTRA, ALFA Group

Case Objectives and Use

The case objectives are: (1) to recognize innovation as part of the company's DNA; (2) to sense and respond to the forces of change, such as globalization, deregulation, liberalization, technology and modularity; (3) to appreciate the relevance of fostering innovation capabilities; and (4) to identify the evolution of business models in companies with a dynamic technology. The case is suggested for MBA graduate courses in the fields of Business Innovation, and Technology-based Business Models.

Case Synopsis

Starting in September of 1995, the Secretary of Communication and Transportation began offering concessions to various companies to construct, exploit and operate public telecommunications networks and to operate national and international long distance services. During the decade from 2000 to 2010, the development of telecommunications in Mexico and the world took place with unexpected speed. When ALESTRA, a business in the telecommunications sector located in Monterrey, Mexico, started as an alternative option for long distance in 1977, none of the companies in the field imagined the huge leap that digital services of data transfer and communication would make in all sectors. In the search for the name ALESTRA, the company aimed to convey that what is far off is constantly getting closer, and to reflect the interaction of humans through communication. Technology partner AT&T, with whom ALESTRA began operations, discovered new horizons when it developed and incorporated digital technologies that transformed analogous signals to digital transmissions, sending bits and bytes at speeds and dimensions that make up cyberspace. The creation of ALESTRA was the result of a change in strategy by the Mexican government to encourage competition and telecommunications infrastructure services that would facilitate the inclusion of Mexican companies in the global economy.

From 1997 to 2002 there was a transition: the change from a market dominated first by a governmental monopoly and later by a private monopoly. This presented a challenge to telephone companies to compete in arenas where public policies were too ineffective to create a competitive environment for all the players. The costs that TELMEX charged the businesses entering the market were too high. For each peso that ALESTRA charged, it had to pay 70 centavos, and this left a very small margin of cost recuperation. In 1998, Rolando Zubirán was appointed the new CEO of ALESTRA. His focus was to reinvent ALESTRA with a value-added business model aimed at the business sector, to search for talent and to develop their potential, encouraging innovation and leadership in the value proposition that was delivered to the customer of today and of tomorrow. In 2011, fifteen years after its founding, ALESTRA designed its portfolio to include broadband services, Internet and private lines. The sector had been very dynamic; Rolando Zubirán and his top management team evaluated the opportunities and the competencies of the organization to reinvent its value-based proposition. What should the new reinvention of ALESTRA be in the media convergence landscape?

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Martha Corrales, EGADE Business School, Tecnologico de Monterrey, Av. Eugenio Garza Lagüera y Rufino Tamayo, Colonia Valle Oriente, San Pedro Garza Garcia, N.L., Z.C. 66269, Mexico, +52 81 8625 6152, mcorrales@itesm.mx.

ROYAL BEGINNINGS:
SUPPLY CHAIN DECISION MAKING IN A BRIDAL SHOP

Lisa Eshbach
Ferris State University

Nancy M. Levenburg
Grand Valley State University

Case Objectives and Use

Set in a small community in Michigan's Upper Peninsula, the owner of a bridal and formal wear shop is focusing on the firm's business strategy, especially with respect to supply chain/vendor management. The shop's merchandise includes wedding and bridesmaid gowns, mother's and flower girl dresses, prom dresses, and accessories. It also rents tuxedos for men. There are typically around 150 wedding gowns, 300 bridesmaid gowns, and 150 mother's dresses in the store. Brides frequently spend 12 hours (or more) shopping in the store before they make a buying decision; they typically seek stylish gowns in high-quality fabrics and reasonably pricing. Because approximately 60 percent of the store's revenues come from sales of wedding apparel, vendor-related decisions are critical.

The case is designed to be used in a course in which students focus on small business operations as a part of business strategy. The case would be useful in graduate-level or upper-level undergraduate courses relating to Retailing or Retail Management, Small Business Management, Supply Chain Management, or Purchasing. The case requires readers to analyze vendor-related decision making in view of buyers' criteria and store-related characteristics and constraints, and develop recommendations concerning sourcing as a component of its business strategy

Case Synopsis

In the fall of 2012, Anna and Jack Oleson, the owners of a full-service bridal shop in one of Michigan's Upper Peninsula's small communities were preparing for their annual six-hour trip to Chicago for the National Bridal Market. They would be making merchandise buying decisions for the upcoming season. However, this year's trip would be very different. Anna and Jack Oleson would potentially be selecting new suppliers to replace their previous merchant. In operation for 23 years, the shop prided itself on offering a full range of services, including a full-time seamstress and alterations. Because brides typically placed orders for wedding gowns – after seeking consultation and trying on samples in the store – rather than buying them "off the rack," receiving timely and reliable deliveries from manufacturers was critical. The vendors' corporate headquarters were located in the U.S. However, the gowns and dresses were manufactured primarily in China. After repeated "miscommunications," a lack of minimum order quantity concessions for smaller shops, and delivery failures with their current supplier, the owners were considering moving on.

To add complexity, the growing population of Millennial brides (those turning 27 years before 2030) were brand- and quality-conscious, sought unique products, and increasingly turned to online retailers to make purchases. The case provides a general overview of retail operations within a small apparel (bridal and formal wear) shop, as well as insights into its market and the supplier's behavior.

The authors developed the case for class discussion rather than to illustrate either effective of ineffective handling of the situation. The case and teaching note were peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19, 2013. Contact person: Lisa Eshbach, Ferris State University, 1301 S. State St. - IRC 212N, (231) 591-3197, eshbacl@ferris.edu

ARCHITECTING A SOURCING STRATEGY: THE PERIL OF ONE AND THE DOWNSIDE OF MANY AT ATLANTICO

Mark Lewis
Appalachian State University

Scott Hayward
Appalachian State University

Ryan Baxter
Bentley University

Case Objectives and Use

This decision case focuses on a consumer products company, Atlantico, as it redesigns its supply chain for poly-wrap (clear plastic wrap that covers its core products). In response to environmental and corporate changes, Atlantico sought greater efficiencies by reducing the number of poly-wrap suppliers from 10 to 1. The case offers students the information used by the consumer products company to reach their decision to move to a single-source strategy. From the vendor perspective it offers an interesting description of how value added services can be added to a commodity product to increase switching costs and supplier power. However, from the perspective of the buyer, the situation looks different.

The teaching notes provides an update, explaining how Atlantico decided to move back to a multi-source strategy. It includes the process framework used by Atlantico, which would generalize to any firm assessing the performance of its supply chain. The case provides an excellent real life situation for learning about relational governance, relationship management, value co-creation, relationship sustainability, and project management all within the broader context of supply chain management. Consequently, the case is well suited for courses in operations or supply chain management as well as course related to process management and analysis.

Case Synopsis

While initially the single-source strategy realized positive results for Atlantico, a disagreement over down-gauging (producing thinner wrap) led Atlantico's sourcing executive, Mike Adams, to reassess the relationship at the beginning of 2009. Not only did the supplier refuse to down-gauge due to associated costs, Atlantico found they had relinquished full control over key internal processes to the supplier as they had not maintained knowledge of key operating metrics. This case asks students to assess the current situation: why were Atlantico's interest no longer aligned with its supplier, and why the two had not built up a trusting relationship. Finally, the case asks students to consider what should Atlantico do to mend the relationship, or should they pursue a different single-source supplier, or move a multiple-supplier relationship. The questions are many, yet the solutions are not necessarily so readily apparent.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Mark Lewis, Appalachian State University, 4059 Raley Hall Boone NC, 28608, 857-231-2756, lewismo1@appstate.edu.

FROM ARES TO ASKLEPIOS – SHARP MARKETING STRATEGY BEND OF "PULSE SYSTEMS GROUP" (SAINT-PETERSBURG, RUSSIA)

Igor Maksimtsev
St. Petersburg State University of Economics (Russia)

Vitally Cherenkov
Graduate School of Management,
St. Petersburg State University (Russia)

The case shows how a few scientists from the famous Russian Ioffe Physico-Technical Institute had founded their own private small hi-tech. This business, registered as PULSE SYSTEMS, LTD. in 1993, had two main strategic core competencies: first, a unique explicit (codified) and implicit knowledge in the field of silicon semiconductor theoretical and applied physics; second, brand value induced by names of the said Ioffe Institute and one of the key company's scientists, Dr. Kardo-Sysoev, who represents his well-known name in the worldwide semiconductor physics community as a sort of brand name. The main purpose of the case is to study best practices under conditions of unfavorable changes in corresponding marketing environment.

Small business is not as inertial one as gigantic companies are. Besides, outsourcing innovative R&D activities is a specific tool of risk management intended to mitigate or avoid damages and losses of reputation capital in the case of failed R&D projects appeared. It is well-known that any uncertainty in business could be interpreted as a possibility of high risk. In our case we have a triple uncertainty: technological, market, and administrative one. The first part of the PULSE SYSTEMS, LTD. story discovers its way to overcome technological and market uncertainties. But, the Russian government has become stronger during the Putin's presidency years. The liberal attitude toward exportation of dual-use products was put under regulations. The main protagonist of the case has arranged only one mass production of silicon semiconductor thyristors triggering launches of light sparkling traps to intercept terrorist ground-to-air missiles. Searching for a not-so-much politically vulnerable product they decided to find a new application for their underground location concept – the ultra-wideband tomography. Hence, the strategic product decision was found having good market opportunities stemmed from a new government policy in the field of public health care. All events and facts given in the case are outputs of our consulting work in favor of the company under consideration – newly incorporated PULSE SYSTEMS-T, LTD. (where "T" means "tomography"). This case should be of a special interest for students because the real obstacles on the way of the PULSE SYSTEMS-T, LTD. to a marketing success are not overcome and this company has not found necessary venture financing till today. The main intrigue of the present case is in the fact that they are in the very beginning of an embodiment for their project understood as a very radical technological innovation.

The case also demands to know how the changes could be revealed in internal as well as in external marketing environment. How to make an extended strategic analysis? How to decrease redundancy and increase reliability of marketing data acquired? The case is supported by a set of theoretical marketing models and strategic analysis tools. Depending on the learning tasks, tailored on group-to-group characteristics basis, the present case could be used in teaching at BA, MA, and MBA levels for many International Business courses. However, the case is mainly destined for B2B marketing and international marketing courses.

The authors developed the case for class discussion rather than to illustrate effective or ineffective handling of the situation. The case, instructor's manual, and synopsis were peer reviewed for presentation at the NACRA 2013 conference, Victoria, British Columbia, Canada, October 17-19, 2013.

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NAKEDWINES.COM:
THE SUDOKU APPROACH

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Sonoma State University

Armand Gilinsky, Jr.
Sonoma State University

Case Objectives and Use

This case is intended to introduce a module on information technology (IT) strategy and competitive advantage in an Information Systems course at the graduate level or Capstone Strategic Management course at the graduate or undergraduate level. The case provides debate over how success can be defined and measured. The Instructor's Manual describes how to use the case: (1) to discuss development, maintenance, and sourcing of an IT-enabled strategy; (2) to analyze the business using ecommerce strategies and determine competitive advantages; (3) to determine viable metrics for benchmarking business (ecommerce) and IT strategies, including financial ratio and VRIO analyses to evaluate competitive strategy; (4) to formulate action plans for new investments supporting the business's strategy; (5) to explore the technical and organizational challenges in developing and deploying an IT platform that includes its websites and mobile application.

Adopters can accomplish the following: (1) illustrate and debate a firm that may have a niche – first mover advantage; (2) debate the value of crowd funding and social media strategies; and (3) develop and defend recommendations for IT-enabled strategies and sustainable competitive advantage. A list of "Suggested Background Reading" that adopters can require students to read is in the Basic Pedagogy section of the Instructor's Manual; a list of "References" to assist with discussion and understanding is at the end of the Instructor's Manual.

Although this case deals specifically with an organization in the wine industry, the issues presented do not require specific knowledge and understanding of the wine industry. The case was tested with EMBA graduate classes, *Information as Capital* and *Strategy in Practice*, for a writing assignment and in-class discussion; and with an undergraduate 'hybrid' distance learning capstone strategy course, for in-class team presentations, all in June 2013.

Case Synopsis

While Nakedwines.com (NWC) was launched in the United Kingdom in 2008, Rowan Gormley, the founder and CEO, expanded his operations to the United States in 2012 with a two-fold strategy - find and invest in U.S. winemakers and find and recruit U.S. customers. With a U.S. presence, NWC continued to look for opportunities to build their brands, increase their recognition, and maintain their first mover advantage…by doing things a little differently. Rowan's initial concept for NWC was easy: 'everybody gets more for less, without trampling on anyone along the way – he called this the 'virtuous circle', where customers demand, winemakers make, and customers get. Now in late April 2013, Rowan pondered about what NWC needed to do now: (1) How to address its information technology (IT) needs in the mobile technology segment. (2) How to acquire customers in order to scale the venture. (3) Moreover, how to sustain its future in the wine industry.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The authors wish to thank the principals of NWC.com for written permission to use this case for academic purposes. All characters and events are real. Financial data supplied by NWC were disguised by the company. Draft dated June 13, 2013. The case and instructor's manual were peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19, 2013. Contact person: Sandra K. Newton, Sonoma State University, 1801 E. Cotati Avenue, Rohnert Park, CA 94928, 707-292-4379, newtonsa@sonoma.edu.

Social Entrepreneurship and Social Responsibility

Track Chair:
Elissa Grossman, University of Southern California

	Butt, Arif Hemani, Shezeen	Sharmeen Obaid Chinoy: The Citizens Archive of Pakistan
	Conn, Carolyn Guess, Aundrea.	West Fertilizer Plant: Preventing Future Disaster
	Cooley, Christine (Sudent Author) Brown, Kory (Faculty Supervisor).	Alpha Natural Resources: Running Right
???	Coulon, Aaron (Student Author) Biteman, James Wilson, Michael (Faculty Supervisors)	Obstetrics in Rural Critical Access Hospitals: Is it feasible?
	Loeb, Karen C. Narapareddy, Vijaya.	Global Washes: Entrepreneurial Solutions for Urban Slums
	Mitchell, Shelley F. Merenda, Michael J.	New Chapter's Path Toward Eco-Advantage
	Rock, Marie	Lobbying for Legitimacy From Gun Valley

SHARMEEN OBAID CHINOY
THE CITIZENS ARCHIVE OF PAKISTAN

Dr Arif Nazir Butt
Lahore University of Management Sciences

Shezeen Hemani
Lahore University of Management Sciences

Case Objectives and Use

The case presents the story of a young, passionate woman who at a very early age founded a nonprofit organization; The Citizens Archive of Pakistan (CAP), and wore the crown of fame as one of Pakistan's most talked about figures in 2012; Sharmeen Obaid Chinoy - an Academy Award and Emmy Award winning documentary filmmaker. By focusing on Sharmeen's role as a founder cum visionary of her nonprofit organization, a journalist turned internationally acclaimed filmmaker and one of the first Pakistani woman to receive a prestigious award from the government, the case offer students the opportunity to consider Sharmeen's beliefs, values, and experiences and the role it played in shaping her into an icon. This case is suitable for graduate and executive courses on *Leadership – Celebrity/Women Leaders*, *Non Profit/Social Enterprise Management*, and *Social Entrepreneurship*. The case can also be effectively used for courses in *Global Studies* as it documents the approach taken by social entrepreneurs working in a developing country take to create a sustainable and scalable social enterprise model.

Case Synopsis

The case opens in June 2013 when Sharmeen Obaid approaches her office to commemorate the sixth anniversary of "The Citizen's Archive of Pakistan" (CAP). CAP is a non profit created to preserve the history of Pakistan through recording oral history, collecting photographs and developing an archive and disseminating it to the public through festivals, exhibitions, school and college outreach, and exchange with neighboring countries such as India.On her way she reflects upon her journey after her graduation from Stanford University moving back to her country, setting up an NGO, and making multiple international award winning films. There was still more to accomplish – CAP's expansion with at least one office in every province, creation of the living history museum in her home town –Karachi, scaling of the school and college outreach program and initiating ties with the other countries such as Bangladesh, China etc.

The beginning of the case briefly outlines Sharmeen's professional life and her engagements as a founder leader of CAP and the CEO of her own for profit company – Sharmeen Obaid Chinoy Films. The later section discusses CAP's core philosophy and scope of work in detail. Imbedded in the case are key lessons on leadership, on understanding the role of a nonprofit leader who while following her passion for making documentary films also attracts note taking attention from media and became known to the general public as a 'national icon".

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. c 2013 by [Arif Nazir Butt, Shezeen Hemani and Mariam Qadeer] Contact person: [Shezeen Hemani, LUMS, Opposite Sector U, DHA, Lahore, Pakistan, +9242-35608000, Shezeen@lums.edu.pk]

WEST FERTILIZER PLANT:
PREVENTING FUTURE DISASTER

Carolyn Conn
St. Edward's University

Aundrea Kay Guess
Samford University

Case Objectives and Use

This case is appropriate for use in a Business, Ethics & Society course. It could also be utilized for a course in public policy or organizational behavior (related to change management) as well as a Business Ethics or Ethical Reasoning course. It is appropriate for either the graduate or undergraduate level. The case requires students to develop an action plan designed to prevent recurrence of an industrial accident which has just occurred in a small farming community. Students will evaluate the ethical values of the main character, a state legislator, and the business owners whose facility caught fire and exploded, causing 14 deaths, hundreds of injuries, and more than $100 million in property damages. In looking ahead to the possibility of implementing new processes or regulations, a balance must be struck between the need for public safety and a healthy business and economic environment. Students will explore the challenges of bringing together an expansive and diverse number of stakeholders to form a common vision and strategy in the wake of disaster.

Case Synopsis

When he was appointed Chairman of the Committee for Homeland Security and Public Safety (HSPS), Texas State Representative Joe C. Pickett understood the significance of the group's responsibilities. Less than 24 hours after an explosion on April 17, 2013 at a fertilizer company rocked the small farm community of West, Pickett had to develop an action plan. The HSPS Committee had been assigned legislative authority over a diverse group of state agencies ranging from Department of Public Safety and the Texas Division of Emergency Management to the Department of State Health Services and the State Fire Marshal's Office. How could HSPS assure the various agencies did not feel like HSPS was stepping on their toes or second-guessing them? How could they develop a single vision and processes for preventing future disaster? Should Pickett concentrate only on his professional responsibilities as a member of the Legislature? What about his personal sense of loss and feelings of moral obligation to others? What should his first actions be as chair of the HSPS?

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 peer reviewed for presentation at the NACRA 2013 Conference,
Victoria British Columbia, Canada, October 17-19 2013. Contact person:
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ALPHA NATURAL RESOURCES: RUNNING RIGHT

Christine Cooley (student author) and Kory Brown (faculty supervisor)
Pacific Lutheran University

Case Objectives and Use

This case explores strategic, social responsibility and cultural issues in the mining of natural resources from the perspective of Alpha Natural Resources, a leading producer of coal in the United States. Facing significant external pressures, Alpha is striving to balance multiple stakeholders, pursue ethical decision-making and drive change management following the culturally-contrasting acquisition of Massey Energy in 2011. This case is ideal for MBA and senior-level undergraduate courses in strategic management, social responsibility and sustainability. Key issues addressed include: acquisition integration challenges, managing safety and environmental concerns, diversification and organizational culture development. Students have an abundance of historical, qualitative and quantitative information in this case to practice internal and external analyses, assess challenges of integration, use change management models and evaluate diversification alternatives.

Case Synopsis

The case is set in 2011, when Kevin Crutchfield, CEO of Alpha Natural Resources, has just acquired Massey Energy, the third-largest coal producer in America and a firm with a troubled past of unsafe working conditions. Alpha, founded less than a decade earlier and grown through a series of acquisitions is challenged with integrating the 7,000 employees of Massey into a culture with the cornerstone philosophies of Running Right, Leading Right and Living Right. Crutchfield also faces external pressures to the coal mining industry including lower-cost natural gas and renewable energy sources, continued pressure from environmental groups to mountaintop removal extraction methods, and an increasingly competitive coal industry. With the goal of growing and thriving in an industry under attack from multiple sides, Crutchfield must decide how to manage Alpha's internal challenges while navigating through rapidly changing times.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Christine Cooley, Pacific Lutheran University, 12180 Park Ave S, Tacoma, WA 98447, 253-538-6060, cooleycs@plu.edu.

OBSTETRICS IN RURAL, CRITICAL ACCESS HOSPITALS: IS IT FEASIBLE?

Aaron Coulon (student author), Tulane University
James Biteman and Michael Wilson (faculty supervisors), Tulane University

Case Objectives and Use

When used in a health care management course, this case will illustrate a dilemma faced by smaller, community-based hospitals and clinics. Changes in US healthcare payment systems, especially as a result of the Affordable Care Act and individual states' responses (often politically motivated) have placed many smaller, rural community hospitals in an uncomfortable situation. Continuing to provide services needed by the community and remaining consistent with their mission may result in poor financial performance or even financial failure. Ultimately, the hospital's administration may face a situation where serving its community (key stakeholder) may be incompatible with the survival of the hospital.

Case Synopsis

Over the past several decades, hospitals have been subject to increasing financial pressures. This and other pressures caused many rural hospitals to stop offering labor and delivery services. In 2012, The chief financial officer of "Bayou Side Hospital" (BSH, disguised) a small, rural hospital in South Louisiana, found himself worried that one day BSH might have to make the same decision. His worry was motivated by rising costs, declining reimbursements, and political uncertainty, but Sullivan knew his decision would affect many stakeholders. Because BSH received a per diem for labor and delivery services to Medicaid patients, which accounted for 80-90 percent of its deliveries, reimbursements often did not cover its costs. However, the government gave BSH a disproportionate share (DSH) payment to offset the hospital's uncompensated care. BSH's current problem that Sullivan faced was that the government was supposed to cut this DSH payment and replace it with expanded Medicaid coverage, but state of Louisiana rejected the expansion. In 2011, the hospital's DSH payment had been $2 million, while its net income was only $1.2 million. Sullivan feared that too much of the hospital's risk was concentrated in a labor and delivery department that could become unprofitable at any time based on what seemed to be inevitable legislative changes.

The safer decision seemed to be for the hospital to discontinue labor and delivery and focus its resources on a service that the government reimbursed on a cost basis (such as the hospital's new and growing orthopedics department). However, labor and delivery was the hospital's number one diagnostic related group (DRG) and the community needed this service greatly. BSH's mission was "To promote and provide quality healthcare services which meet the needs and exceed the expectations of our patients and other customers in an environment of dignity and respect." Ultimately, Sullivan faced the following questions: would continuing to offer labor and delivery worsen the hospital's financial situation? If so, should he discontinue the service to ensure the hospital's stability and increase its income, or could he continue to offer labor and delivery by trimming fat from other areas to stay afloat, in order to meet the community's most pressing need?

The authors developed the case for class discussion rather than to illustrate either effective ir ineffective handling of the situation. The case and teaching note were peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada. Contact person: James Biteman, Tulane University, 7 McAlister Drive, New Orleans, LA 70118, 504-865-5459, jbite@tulane.edu

GLOBAL WASHES:
ENTREPRENEURIAL SOLUTIONS FOR URBAN SLUMS

Karen C. Loeb and Vijaya Narapareddy
University of Denver

Case Objectives and Use

This case is intended for graduate courses in social entrepreneurship. The target audience is MBA and executive MBA students. The issues include creation of shared value (CSV), TQM tracking processes, and community engagement that lead to measurable, sustainable operations in the water and sanitation sector. The case also addresses how to create behavioral change in challenging circumstances like urban slums and how to use hygiene training as a marketing tool to drive usage of WASH facilities. Students will learn that technology alone does not guarantee successful enterprises; instead, attention to "soft" processes related to technology implementation is equally important and often requires "staying the course" beyond original expectations. Students will also learn how careful monitoring and analysis of health and financial data demonstrates the 3-Ps of sustainability of an operation, which, in turn, lays the foundation for replication and expansion in the form of social franchising.

Case Synopsis

This case begins as Kim Larson, business lead for the Global WASHES group, returns to Kenya to visit the water, sanitation, and hygiene facilities her Rotary club constructed in the Silanga village in Kibera from 2005 to mid-2009. Kibera was one of the largest urban slums in Africa where people were extremely poor (earning $1-$2/day), and their living conditions were substandard, with no access to clean water or sanitation facilities within their homes. Even water pipes from Nairobi Water and Sewage Company were contaminated from waste by illegal taps into them. Dirt and filth abounded in all the paths between homes and shops and where children played. The Global WASHES (Water, Sanitation, and Hygiene Entrepreneurial Solutions) team was comprised of Rotarians, University faculty and graduate students, and consultants; the team worked in conjunction with a local NGO, including supporting a local project manager to oversee repairs and operations at the original 8 sites. With attention focused on hygiene training, business planning and local governance from 2009-2013, the facilities began operating with positive net margins, reflecting a sustainable model for this particular WASH (Water, Sanitation, and Hygiene) social concept. Students have the opportunity to decide if this concept could be extended to a social franchising model, where the kind of facility operation and management that had been put in place in the village of Silanga could be applied to other urban slums to alleviate many of the problems associated with unclean water and environments and, hence, improve the health of residents in such communities.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Karen C. Loeb, University of Denver, Daniels College of Business, Rm 455, 2101 S. University Blvd., Denver, CO 80208, 303-475-5796, kloeb2@du.edu

NEW CHAPTER'S PATH TOWARD ECO-ADVANTAGE

Shelley F. Mitchell
University of New Hampshire

Michael J. Merenda
University of New Hampshire

Case Objectives and Use

The New Chapter case was written for use in undergraduate and M.B.A. level courses in strategic management, entrepreneurship and sustainable business models (Profits, People & Planet). The concepts of social business, sustainable enterprise and social entrepreneurship were targeted in this case, which have received increased attention by academics and practitioners alike. Students will develop insights of how strategy is informed and shaped by its external environment and internal environments that can be addressed from several perspectives with this case. It can be used to illustrate the entrepreneurial perspective and the critical role founders at various stages of an organization's development have in identifying and exploiting market opportunities in an emerging and rapidly growing industry.

In both the strategy and entrepreneurship courses the emphasis can be on teaching several strategy concepts, including the Industrial Organizational Approach, or the Five Forces Model in a Resource Based View approach to strategy. Another interesting strategy concept that can be used in teaching the case is the Stakeholder or Multiple Sovereign views of the firm and managerial decision-making versus the Single Sovereign or Market Contract view of the firm and decision-making. The case can be used early in entrepreneurship courses to highlight the stages of organizational growth and development, or the factors and conditions that drive the entrepreneurial process and venture success.

Case Synopsis

What should have been a time for celebration was turning into a time of concern and retrospection. The protagonist (e.g., Barbi Schulick, Co-founder of New Chapter) was busy justifying why New Chapter, a company known for its non-traditional business philosophies and strategies was sold (e.g., March, 2012) to Procter and Gamble (P&G). New Chapter was recognized was as a major leader and innovator in the rapidly growing herbal supplements and remedies marketplace. Meanwhile, major changes were occurring in the industry segments of natural and organic foods, and herbal supplements and remedies. What for many years was a small and limited market catering to hippies and health food junkies was quickly becoming mainstream, innovative and attractive to numerous multi-national companies in several industries.

The Schulicks saw the sale to P&G as an exit strategy for their equity investors and an opportunity to fund a growing business, while advancing New Chapters' sustainable mission and guiding principles. Loyal and ardent New Chapter retail customers saw it as selling out to a powerful global consumer goods company. Would New Chapter's commitment to a sustainable business model that promoted a healthy lifestyle survive under the management of a company known for its mass production and mass distribution of its branded products? For many it was not a matter of ethics or what each company brought to the new arrangement, but a potential clash in philosophies, values, and business models.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Shelley F. Mitchell, University of New Hampshire, Paul College of Business and Economics, 10 Garrison Avenue, Room 365 C, Durham, NH 03824, 603-868-3352, shelley.mitchell@unh.edu.

LOBBYING FOR LEGITIMACY FROM GUN VALLEY

Marie Rock
Bentley University

Case Objectives and Use

The case is meant to be taught in Business-Government-Society (BSG) courses at both the graduate and undergraduate levels. It may also be used in BSG segments of other courses, such as strategy and nonprofit management when examining the external environment. Because of the regulatory issue of gun control and its potential impact on the industry, the examination of the lobby that advocates for the firearms industry makes this case especially relevant to BSG or similar courses. Objectives: include the study of the external environment of the National Shooting Sports Foundation; the application of stakeholder strategy and stakeholder management concepts, along with application of resource dependency theory concepts. These concepts are commonly found in BSG courses and nonprofit management courses. The case is intended for use with higher level undergraduate courses and graduate level courses.

Case Synopsis

This case focuses on the issue of gun control and the efforts of the “most powerful gun lobby” to influence public opinion and legislation that would alter or ban the manufacture of assault-style rifles in the United States, particularly after the Sandy Hook Elementary School incident in which 20 children and 6 adults perished on December 14, 2012. The reader is introduced to the development of a burgeoning firearms industry in the early United States based in the so-called “Gun Valley” of New England.

The gun lobby that represented manufacturers was the National Shooting Sports Foundation (NSSF), which was founded in 1961 as a nonprofit trade association and was based in Newtown, Connecticut, just about three miles from the Sandy Hook Elementary School. As the leading gun lobby in the U.S., NSSF influenced legislation at both state and national levels in favor of the gun industry. In 2012, following the shootings at Sandy Hook Elementary School in Newtown, the NSSF faced a backlash against the industry and its position that supported the manufacture and marketing of "modern sporting rifles" whose appearance was based on the AR-15 rifle platform.

This case also examines the evolution of the firearms industry in the early history of the United States, and provides background information on the development of the so-called “gun culture” in the United States. The case shows how the NSSF strategy was to both broaden and grow its membership in recent years so that it can readily influence more segments of society and governments, particularly regarding the issue of gun control of the AR-15 platform of the modern sporting rifle.

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 were peer-reviewed for presentation at the NACRA 2013 Conference, Victoria, British Columbia, Canada, October 17-19, 2013. Contact person: Marie Rock, Bentley University, 175 Forest Street, Waltham, MA 02452-4705.

Strategy and Policy Track

Track Chairs:
John Gamble, University of South Alabama
Gina Grandy, Mount Allison University

Arnison, .Mark.	RBC and the MicroFIT Program
Attanasio,Meagan Treadway, Rebecca	Green Mountain Coffee Roasters, Inc.: Shared Value - A Positive Difference
Fergus, Andrew Bell, Tony	Research In Motion: A Crash and Reboot
Grandy, Gina Stewart, Rhian	Getting Better or Bigger: Deciding the Best Ways to Position and Grow a Not-For-Profit Youth Camp
Hariharan, Sam Rangan, U. Srinivasa Wylie, David	Vermont Butter and Cheese Creamery
Lawrence, John J. Mishra, Anubha	Telect Inc. and the 30 Year Ride: Edgy, or Over the Edge?
Migliore,R. Henry Lay, Melissa Crawford, Bill	Dollar Thrifty Automotive Group
Nunez, Remy Balarezo Garcia, Paul Corcuera	Peru´s Mining Engineering
Sebora, Terrence Ibrayeva, Elina	Union Pacific: Through Deregulation & Beyond
Soorea, Rajeev Ghosh, Jayati Sharma, Supriya Barahona, Marcia (Student Author),	Labcon North America: Reinventing Science Business or Fiction?
Vitton, John Helleloid, Duane Schultz, Patrick Nam, Seong-Hyum	United Continental Holdings, Inc. - 2013

RBC AND THE MICROFIT PROGRAM

Mark Arnison
MacEwan University

Case Objectives and Use

This case centers on the implementation of a strategic initiative in the area of environmental sustainability, and a resulting misalignment that occurred between two business units of a major Canadian financial institution. The case is targeted at undergraduate business students taking strategic management.

The learning objectives are for the students to be able to:

1. Analyze the causes of a strategy implementation misalignment.
2. Develop an informed plan to respond to the misalignment.
3. Create an informed plan to reduce the risk of similar situations happening in the future.

The case can be used to illustrate organizational structure, systems and culture as elements of strategy implementation, the impact of government regulation on strategy, the importance of stakeholder analysis and the critical need for communication across organizational boundaries.

Case Synopsis

In 2010 RBC Financial Group, a banking and insurance company headquartered in Toronto, Ontario, Canada was seeking ways to operationalize their environmental sustainability strategy. They had implemented a new loan program targeting clients who were seeking loans for the installation of electricity-generating solar panels on their property. These clients were installing the panels in order to sell power to the Ontario Power Authority under a new government sponsored green power program called MicroFIT. For RBC the loan program was seen as an excellent way to support environmentally focused initiatives. However, in October 2010, Jim Hart, National Manager, Business & Professional Service Clients at RBC determined that the program was running into problems. Once the banking business unit at RBC had sold the loans to a client, and the client had installed the solar panels, the insurance business unit at RBC was then canceling the client's insurance policies. A complicating factor faced by RBC in this situation was a high degree of government regulation which restricted company operating practices.

The author developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching were peer reviewed for presentation at the NACRA 2013 Conference, Victoria, British Columbia, Canada, October 17-19, 2013 by Mark Arnison. Contact person: Mark Arnison, MacEwan University, South Campus, 265-7319-29 Avenue NW, Edmonton, AB, Canada, T6K 2P1, 780-497-5735, arnisonm@macewan.ca.

GREEN MOUNTAIN COFFEE ROASTERS, INC.
SHARED VALUE—A POSITIVE APPROACH

Meagan Attanasio
Maryville College

Rebecca Treadway
Maryville College

Case Objectives and Use

This case is best taught in an undergraduate Strategic Management class to define and explore the strategy of differentiation - how a company initially differentiates itself and continues to maintain brand awareness and distinction. Shared Value serves as a rich source of differentiation for Green Mountain Coffee Roasters (GMCR). The case facilitates student understanding of shared value as it relates to corporate social responsibility. As differences become worn and ubiquitous, there is need for momentum and refinement to sustain strategic significance. The study provides introspection on leadership and differentiation strategy as students note the relevance of a strong leader in the creation of an organization's differentiation strategy and at times of immense growth and change.

Case Synopsis

The rapid growth of Green Mountain Coffee Roasters (GMCR) from a small coffee retailer to one of the largest coffee suppliers and brewer manufacturers in the single-serve market placed GMCR in the public spotlight. In 2006, GMCR acquired Keurig and began offering a ground-breaking product, a single-serve, at home coffee brewer. Company success was dramatic as it experienced soaring profits from increased sales. The strategic acquisition of Keurig and valuable patents gave GMCR an edge on the competition; yet, two important patents were set to expire in September of 2012.

GMCR faced intense speculation that it would lose market share due to the impending expiration of patents and broaching competition. Yet, Larry Blanford, president and CEO of GMCR, believed the company was built on a sustainable foundation - something more than patents and technology. He believed shared value provided a strong platform and source of differentiation for GMCR. Was it the beginning of the end for GMCR or the continuation of an on-going cycle of unfolding profits? Had GMCR implemented initiatives that would generate a higher form of capital and consciousness?

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19, 2013. Contact person: Rebecca Treadway, Maryville College, 502 E. Lamar Alexander Parkway, Maryville, TN 37804, (865) 604-6749, Rebecca.treadway@maryvillecollege.edu

RESEARCH IN MOTION:
A CRASH AND REBOOT

Andrew Fergus and Tony Bell
Thompson Rivers University

Case Objectives and Use

Developed for use in a Strategic Management course this case examines the decline of Research In Motion as a major player in the smartphone industry. In Part A: A Crash, the decision question for students is: What strategy should the newly appointed CEO, Thorsten Heins, use to turn the company around? The second section, Part B: The Reboot, examines Thorsten Heins' first year as CEO, and challenges students to evaluate Heins' performance.

The case, which has been successfully used in Strategic Management courses at the undergraduate and graduate MBA level, was developed to examine general strategic management topics such as external industry analysis, development and sources of competitive advantage, and managing a strategic turnaround. Additionally it provides students a chance to evaluate a turnaround strategy in progress. On completing the case analysis students will have a deeper understanding of why an organization can lose a leading position in its industry and what is required in a strategic turnaround.

Case Synopsis

Founded in 1984 Research In Motion Limited (RIM) is a telecommunications and wireless equipment manufacturer, most notably known for the Blackberry range of products. "Driven by Ideas" is the foundation upon which RIM based its global growth, and the idea of success through innovation is intertwined throughout the company's culture. Known for secure and innovative products, RIM's growth was impressive. In a short space of time RIM had grown from a market capitalization of $500 million in 2002 to over $75 billion before the financial crisis of 2008. However, as rapidly as it had risen, RIM's market share dropped drastically in 2011 and the company's valuation followed suit, prompting a major management overhaul including the appointment of a new CEO, Thorsten Heins.

The case examines the decline of RIM from its commanding market position to the point where the company was struggling to remain competitive. Part A: A Crash, allows students to take on the role of new CEO, Thorsten Heins, and to make recommendations as to what RIM should do next. Part B: The Reboot, examines the turnaround strategy implemented by Thorsten Heins and asks students to evaluate whether he has made the right strategic moves.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact Person: Andrew Fergus, Thompson Rivers University, 900 McGill Rd, Kamloops, BC, Canada. V2C 0C8. 250 377 6015, afergus@tru.ca

GETTING BETTER OR BIGGER? DECIDING THE BEST WAYS TO POSITION AND GROW A NOT-FOR-PROFIT YOUTH CAMP

Gina Grandy
University of Regina

Rhiân Stewart
Newalta

Case Objectives and Use

This case was formulated for university undergraduate students in their fourth year of study or graduate students in a MBA program. It is appropriate for not-for-profit management and general management / strategic management classes and intended for a 75 to 90-minute class session. The case is intended to challenge students to define industry boundaries, evaluate industry structure, understand competitive positioning and assess financial sustainability in not-for profit organizations. Students should already have some understanding of the differences in strategy between for profit and not-for-profit organizations. The case can be taught as an application of industry structure analysis, competitive positioning and / or evaluation of strategic options for not-for-profits.

Case Synopsis

The case opens with the Board Chair of Camp Ta-Wa-Si (Ta-Wa-Si), a youth camp in New Brunswick affiliated with the United Church of Canada, contemplating whether or not the Board should move forward with a new building project to be ready for unveiling for its 75th anniversary in 2015. For a number of years, Ta-Wa-Si camper registrations were lower than were required to break-even and it had relied heavily on donations from local Churches and individual supporters to offset the operating deficit. Wesley Memorial Church, a long time supporter of Ta-Wa-Si, donated more than $200,000 from the proceeds of the sale of their building. Such large donations would not be forthcoming in the future given Wesley's closure and that other United Churches in the area were also struggling financially. Ta-Wa-Si faced competition from a number of religious-based and non-religious based camps in the area, most of which offered more diverse programming or were positioned with a stronger Christian message. There were differing views from Board members as to whether or not a new building was a wise strategic decision for the camp. Don Trenholm, Board Chair, felt a new building would bring with it opportunities for growth but that it would also be a distraction for the Board. There were several other projects that required completion within the forthcoming six months, such as the woodlot development, promotion, personnel and general property maintenance, and only a handful of active and committed individuals to complete the projects. If the Board decided to commence construction, it would also need to determine the type of new building, size, location, purpose, viability, timeframe, and who would champion the project. It was December 2012 and no major decisions were needed immediately, but Trenholm knew several individuals were eager to make a decision and move forward before the 2013 camping season.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Gina Grandy, gina.grandy@uregina.ca.

VERMONT BUTTER AND CHEESE CREAMERY

Sam Hariharan, U. Srinivasa Rangan, David Wylie
Babson College

Case Objectives and Use

The Vermont Butter and Cheese Creamery (VBCC) can be used in courses in Strategy, Strategy Execution, or Entrepreneurship at undergraduate, graduate, or executive MBA levels. The case is best used in the second half of such courses when the students would have gained some grounding in industry analysis, strategic positioning, and assessing competitive advantage and capabilities. While the primary learning objective of the case is to help students understand the challenges of managing growth as faced by a niche player in an industry and the importance of the ecosystem in which a company operates, there is sufficient detail in the case to do an industry analysis, and demonstrating how differentiation strategies in niche segments can be quite profitable. In addition, value chain analysis can be used to identify and understand the sources of competitive advantage enjoyed by a niche player following a differentiation strategy. The case allows for an in-depth discussion of the challenges to sustainability posed by success and growth, and how companies may attempt to shape and improve the business ecosystem they inhabit. Finally, the case provides an excellent vehicle to show both the use and limitations of techniques such as Discounted Cash Flow (DCF) in strategic investment decisions.

Case Synopsis

In late 2010, Bob Reese and Alison Hooper, co-founders of VBCC, and Adeline Druart, general manager of plant at VBCC, face a string of inter-related strategic, financial, and operational challenges at the highly successful firm that specializes in artisanal goat cheese and butter. In particular, the success of the company, and the accompanying growth in its revenues and output, is straining the company due to the limited supply of a key input to the company's flagship products: goat's milk from Vermont sources. Given the importance of the label "Vermont" in the brand and what it stands for in terms of its brand equity, VBCC is exploring multiple options to create additional sources of goat's milk so that it may grow its business without risking its quality reputation, and the unique taste of its offerings.

The trigger issue in the case is the evaluation of the various options in front of VBCC to improve the supply of goat milk in Vermont. While all options have their pros and cons, the most interesting option concerns whether VBCC should invest in an experimental goat farm to spur the production and increase the supply of goat milk in Vermont. Reese, Hooper, and Druart, however, are concerned about the challenges of establishing such a farm and making it work. Three set of issues come to the fore: strategic, financial, and organizational. The strategic challenge arises from the analysis of the reasons for the success of VBCC and how the various options relate to them. The financial issues relate to capital needs, financing options, and, of course, viability of investment. The organizational issues arise from the fact that VBCC's capabilities are in making and marketing cheese rather than farm management.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and the teaching note were peer reviewed for presentation at the NACRA Conference, Victoria, British Columbia, Canada, October 17-19, 2013. Contact Person: Professor U. Srinivasa Rangan, Olin Hall 311, Babson College, Babson Park, MA 02457, Telephone No.: 781-239-4237, e-mail: rangan@babson.edu.

TELECT INC. AND THE 30 YEAR RIDE:
EDGY, OR OVER THE EDGE?

John J. Lawrence
University of Idaho

Anubha Mishra
University of Idaho

Case Objectives and Uses

This case was written for strategy courses at either the undergraduate or MBA level. It focuses on strategic leadership and the role of the executive team in both setting corporate culture and in developing and maintaining strong relationships with the organization's stakeholders, and in particular, it's customers. The case also allows students to consider the nature of the relationships among members of the executive team. As a result of preparing and discussing the case, student should better understand (i) the various roles that executive leaders play within their organization and be able to interpret leaders' actions in the context of these roles; (ii) what corporate culture is and how a leader's actions can shape that corporate culture; (iii) the processes that make up customer relationship management and the CEO/executive team's potential role in these processes (particularly retention & growth); and (iv) the value of, and trade-offs between, face-to-face and virtual interactions with customers.

Case Summary

This case is set in November of 2011. Wayne Williams, the CEO of Telect, Inc. has proposed that he and the company's CFO, Stan Hilbert, get on their Harley Davidson motorcycles and spend a month or more riding around the country visiting the company's customers in honor of the company's upcoming 30th anniversary in September of 2012. Wayne wants to take the ride as a way to personally thank the customers who have helped it reach this milestone as well as to showcase the company's product offerings and find out from customers what more Telect could be doing to meet their needs. Stan Hilbert is concerned that the ride could backfire and be misinterpreted by customers, eroding rather than enhancing customer relationships. He is also concerned that employees will not see the ride as the best use of the company's resources and CEO and CFO's time, and that the company may not want to take on the physical risks of having its executive team travel around the country by motorcycle. The student is put into the shoes of the CFO and must decide whether or not to support the ride. If they support the ride, they need to craft a strong argument for the ride to present to the company's board of directors. If they decide not to support the ride, they need to craft a strong argument that will have a chance of convincing the CEO to change his mind about the ride.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013.

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DOLLAR THRIFTY AUTOMOTIVE GROUP

R. Henry Migliore
Managing For Success

Melissa Lay
HealthSource of Tulsa

Bill Crawford
Southern Nazarene University

Case Objectives and Use

1. Introduce students to the working of the car rental industry
2. Demonstrate to students how global expansion competitively positions an organization
3. Require students to identify, evaluate, and select appropriate strategies for global expansion
4. Allow students to evaluate company mission statements with respect to operations
5. Introduce student to advantages and disadvantages of franchising in domestic and international markets
6. Require students to identify how DTAG's partnership with Daimler Chrysler will aid in global expansion

Case Synopsis

Dollar Thrifty Automotive Group (DTAG) operates both Dollar Rent-A-Car Systems and Thrifty Rent-A-Car Systems. Together, Dollar and Thrifty have approximately 1,100 rental locations throughout the U.S. and Canada, with over 800 locations run by franchisees. In addition, DTAG has franchised locations in over 75 countries. In the United States and Canada, DTAG revenue sources are from airport markets. In contrast, franchising is the primary source of Thrifty's revenues, while Dollar's revenue source is derived from company-owned locations.

In recent years, the leisure travel market has grown substantially. This growth, both nationally and internationally can be attributed to increased travel from "baby boomers." As a result, there has been a rise in the hotel and tourism industries. These industries' analysts believe the Internet has been a contributing factor to an increased number of Americans traveling for leisure. Both subsidiaries of DTAG currently offer on-line car rental services to their customers.

Students will evaluate services offered to Dollar and Thrifty customers, along with markets served, while identifying areas of future growth. Also, students will create a *strategic plan of expansion* into foreign markets for business and leisure travelers.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Bill Crawford, Southern Nazarene University, 8210 East Regal Court, Tulsa, OK 74133, bill@crawford.net, 918-451-2404.

PERU´S MINING ENGINEERING

Remy Balarezo Nuñez and Paul Corcuera Garcia
Universidad de Piura

Case Objectives and Use

The present case can be used for the course of General Management in MBA programs and also in undergraduate levels. The main objective is to help students learn to analyze key factors of success in a company and how is it that a company obtains and develops resources and capabilities. After preparing and discussing the present case students will be able to assimilate the following knowledge: analyze a industry, determine key success factors, identify resources and capabilities of an organization, identify competitive advantages in an organization and define a strategy.

Case Synopsis

On the morning of March 25th, 2013, Claudio Gomez, new General Manager for the Peru´s Mining Engineering (IMP), is returning from a business trip and should define a new work plan to the company's board of directors facing drastic changes in the external context of the company. IMP is a Peruvian company located within the mining industry of Peru, one of the most important industries in the country´s economy. Claudio does not clearly know whether the company should continue to grow as it has been doing in the last 10 years or if it is time to stop such growth and consolidate.

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Dr. Paul Corcuera García, Universidad de Piura, Av. Ramón Mujica 131 Urb. San Eduardo Piura, Perú, 511 – 073 – 284500, paul.corcuera@udep.pe MBA Remy Balarezo Nuñez, Universidad de Piura, Calle Mártir Olaya 162 Miraflores, Lima Perú, 511 – 01 – 2139600, remy.balarezo@udep.pe .

UNION PACIFIC:
THROUGH DEREGULATION & BEYOND

Terrence Sebora and Elina Ibrayeva
University of Nebraska-Lincoln

Case Objectives and Use

The intended audience of this case is students in undergraduate lower-level strategic management courses. This case immerses the reader in the history of Union Pacific and the entire railroad industry, as well as the forces which have made their mark on both. The case illustrates the complexity of strategic change and may serve as a dialogue-starter on a number of controversial subjects such as regulation and unionization.

The following case objectives are recommended:

1. Identify the most significant strategic issues facing a company
2. Understand why a firm's strategy is important in guiding firm choices and actions
3. Appreciate the complexity and moral ambiguities involved in governmental regulation of businesses.
4. Appreciate the complexity and moral ambiguities involved in unionization of businesses.
5. Learn about the transformational role that technology can play across industries, including the railroad and trucking industries.

Case Synopsis

The case examines Union Pacific's history through deregulation of the railroad industry as it faced multiple crises and changed its strategic course. It paints a picture of an industry shaped by political and legal forces, national and global economies, population growth, geography and technology. Moreover, the case illustrates how these environmental forces intersected to define Union Pacific's competition with the trucking industry. It witnesses the transformational role played by technology. It also captures the industry's sometimes-adversarial relationship to its labor unions. This case sets the stage for the instructor to initiate a discussion on regulation and labor unions – two controversial but nonetheless very important topics influencing business decisions. The reader is asked to consider whether entering the trucking (again) is consistent with Union Pacific's current strategy and challenges.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note were peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Elina Ibrayeva, College of Business Administration, University of Nebraska Lincoln, NE 68588-0491, 402-472-9433, eibrayeva2@unl.edu

LABCON NORTH AMERICA:
REINVENTING SCIENCE BUSINESS OR FICTION?

Rajeev Sooreea
Dominican University of California

Jayati Ghosh
Dominican University of California

Supriya Sharma
Dominican University of California

Marcia Barahona (student author)
Dominican University of California

Case Objectives and Use

This case demonstrates the decision challenges that the President of a biotech firm in the San Francisco bay area faced in trying to adopt a strategic technology to help his organization improve its efficiency and competitiveness and maintain its leadership in sustainable biotechnology. The case integrates two fields: business and science. The business aspect involves elements of strategy, corporate finance and sustainability. The science aspect involves elements of biotechnology and health care management. This case is appropriate for use in upper-division undergraduate, graduate, or executive education level classes in a strategic management course that wishes to include these elements. After studying this case, students will be able to:

- Analyze the strategies of sustainable biotech businesses
- Examine how to tailor value chain to value proposition to enhance profitability
- Evaluate the challenges involved in the outsourcing of high-technology businesses
- Propose strategic fits of new technology using strategic and financial principles and tools.

Case Synopsis

In May 2013, Jim Happ, President of Labcon North America, a 205 employee biotech enterprise, wanted to build an in-house electron beam sterilization facility at its Petaluma, California-based manufacturing plant to sterilize the laboratory consumables that his company produces. However, Labcon's owners, Helena Laboratories of Texas, were not very thrilled by Happ's ambition. They were reluctant when Jim Happ proposed to install an 800 kW solar panel roofing system in 2010. Now they were reluctant again with Happ's proposed in-house technology. They believed that Labcon's sterilization services vendor in Hayward, California, was well positioned to continue contracting with the company.

Labcon, the world's leading producer of low carbon laboratory disposables exported 800 products to 57 countries worldwide, generating $32 million in sales annually. Under Happ's leadership, Labcon was the first to market biodegradable labware, and received the Presidential "E" Award for making a "significant contribution to the expansion of U.S. exports." In 2011, Happ succeeded to install one of the largest solar rooftops in Northern California at Labcon's manufacturing plant. He wanted to take this opportunity to sun power the sterilizer. With Helena Labs' resistance, Jim Happ wondered how he should push Labcon once again to the frontier of sustainability: Would his ambition of reinventing his biotech business realize or remain science fiction?

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 peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19 2013. Contact person: Rajeev Sooreea, School of Business & Leadership, Dominican University of California, 50 Acacia Ave, San Rafael, CA 94901. Tel: 814-505-2398, E-mail: rajeev.sooreea@dominican.edu

UNITED CONTINENTAL HOLDINGS, INC. 2013

John Vitton and Duane Helleloid
University of North Dakota

Seong-Hyun Nam
University of North Dakota

Patrick Schultz
University of North Dakota

Case Objectives and Use

This case study was developed to examine the complex interaction of political, economic, demographic and competitive forces in the general and industry environments that impact upon an airline's profitability and ultimate survivability. The case was designed to hone analytical skills and decision-making ability and provide opportunities to apply Michael Porter's Five Forces Model, Barney's resource-based analysis of an organization's assets e.g. Value, Rareness, Imitability, and Organization (VRIO) framework, Slywotsky's Value Migration theories, and other Strategic Management theories. Additional objectives involve exploring why many of the major airlines have suffered staggering financial losses and bankruptcy. Was the problem the hub and spoke structure, the inability to cope with escalating fuel and labor costs, culture clashes, incompatible aircraft mix, or was it a lack of experienced, effective, visionary management leadership needed to turnaround an airline in trouble? This case was primarily targeted for undergraduate, graduate, and executive level courses in strategic management. It may also be of interest in union management courses and in the curricula of university aviation departments.

Case Synopsis

The case study opened by briefly describing the growth of the airline industry from its earliest passenger flight (1914) to the delivery of mail (1920s), and the attendant legislation governing and nurturing the aviation industry. That legislation severed aircraft manufacturing from operating airlines and those engaged in engine production (1934). The Civil Aeronautics Act (1938) which regulated competition, by controlling routes flown, prices charged by airlines, and created the Civil Aviation Board to administer the Act's provisions. The Federal Aviation Act (1958) was enacted to oversee safety. The Airline Deregulation Act (1978), which marked the end of the reign of government over pricing and assignment of routes, also phased out the Civil Aeronautics Board. The swashbuckling founding years of United and Continental Airlines, highlights of United and Continental's competition, airline functional activities, and Gordon Bethune's turnaround strategy that led Continental Airlines, to climb from worst to first in the airline industry were addressed. United Airlines Chapter 11 bankruptcy (December 2002 - February 2006) was followed by the United Continental merger in 2010. The case ends by questioning whether United Continental Holdings (UCH) beset by high fuel costs, cut-throat competition, heavy dependency upon debt (pension obligations), culture clashes, complexities of integrating two major airlines (both of which have previously been in Chapter 11 bankruptcy), and a \$585 million loss in 2008 by Continental, can right itself and fly safety and profitably into the future.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note were peer reviewed for presentation at the NACRA 2013 Conference, Victoria British Columbia, Canada, October 17-19, 2013, by John Vitton et.al. Contact person: John Vitton, Management Department, Stop 8377, University of North Dakota, Grand Forks, ND 58202, (701) 777-3229, Fax (701) 777-2019, john.vitton@business.und.edu

Appendix A

NACRA 2013 Plenary Session

Management: Theory and Practice, and Cases by Richard L. Nolan

William Barclay Harding Professor of Business Administration, Emeritus
Harvard Business School

Professor Emeritus of Management and Organization
Foster School of Business, University of Washington

Introduction

Dartmouth's Amos Tuck was established in 1900 as the first graduate school of management. The Harvard Business School (HBS), established in 1908, awarded the first Master of Business Administration (MBA). While Tuck was the first graduate school of management, HBS is noted and famous for having pioneered the case method—arguably, the dominant methodology for training management professionals.

The HBS founders concluded that post-graduate study of management had similarities to other professional schools like Medical and Law Schools. This similarity in learning from practice is reflected in the footnote of every Harvard Business School case: "Cases are not intended to serve as endorsements, sources of primary data, or illustrations of effective or ineffective management." This footnote cautions that similar to other professions like medicine and the law, there are rarely pat answers to complex decisions in the disciplines of continuously changing fields and those that are imbued in highly complex human situations. Experience and judgment are always in play, and relevant in many ways.

Teaching cases are intended to focus on important issues in the purview of practicing managers, and as a basis for discussing these issues in context, determining alternative courses of actions for analyzing and deciding on these issues, and facilitating a process of contemplation by the student in creating his/her knowledge necessary to operate as an effective management leader. The MBA degree is intended to certify that a graduate has engaged in an intensive process of mastering a process of study that embodies analyzing the key set of management issues of practicing executives and techniques for executing alternative courses of actions for addressing the issues. As important, case study is intended to communicate and provide incentive to aspiring managers to maintain a process of reflection on their decisions in practices and a drive towards continuous learning. This continuous learning is facilitated by activities at HBS including publishing teaching cases and the *Harvard Business Review*, providing global Executive Education programs, and hosting research conferences on important business subjects such as causes of the Financial Crisis of 2008.

While cases persist in the curricula of virtually every business school, cases and the case method as developed and used at HBS are not without controversy, especially at major research universities with business schools. I studied management at a research university whereby the traditional arts and sciences faculties exerted strong influence and control in the university and faculty promotion processes. Faculty promotions were submitted to the President and a senior university faculty committee (without senior business school faculty members) for final review. In the final oversight review, published articles in what are called "first-tier academic journals"[1] were heavily weighted in the final tenured promotion decisions. Cases and case teaching were given secondary consideration, if any consideration at all.

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[1] "First tier" journals were heavily biased towards established academic fields such as *Administrative Science Quarterly* for business school faculty specializing in organizational behavior, or *Communications of the ACM* for business school faculty members specializing in IT strategy and management. Only recently were established business journals such as *Harvard Business Review* or MIT *Sloan Management Review* given more weight in the academic review process for promotion and tenure.

Accordingly, I like many management students, had mixed exposure to cases during my business school studies. What exposure I did have with cases in the classroom were more lectures about the case than class discussion of the case issues. And there were failed attempts by some faculty to throw together a 1 or 2 page "arm-chaired" written case to spice up dry lectures. These attempts further undermined the case method and the development of quality field cases as important academic learning experiences.[2]

However, there were some exceptions in that our business school faculty did have two tenured professors with DBA's from Harvard, and teaching experience at HBS. These professors did incorporate cases and case teaching in their classrooms, and also were among the most popular instructors. Nevertheless, both professors did not come through the ranks of Assistant to Associate to Tenured Professors at the research university. Both came to the faculty as senior professors with tenure. While this situation still persists at many business schools, researching and case writing has continued to broaden beyond the Harvard Business School in many ways, such as at the University of Virginia and Ivey business schools, and through the efforts of NACRA (North American Case Research Association).[3]

Learning the case method requires an infrastructure, takes time and is continuous. After a three-year whirlwind career after graduating from the University of Washington with my PhD in Business in 1966, a year and half at the Boeing Corporations as a simulation software engineer then manager in the Boeing 737 program, a year as an Assistant Professor at the University of Illinois and a year as a Systems Analyst McNamara "whiz-kid" at the Department of Defense, I landed at HBS as an Associate Professor, and was quickly overwhelmed by being immersed into a total case teaching environment. My first-year involved a steep learning curve about the HBS culture; and my first-year MBA classroom case teaching experience almost did me in—which even today when I think about it, is a vast understatement. The experience set me off on a life's journey in learning how to teach and create effective business cases.

I was lucky too. During my first two years at HBS, I was in a first-year teaching group with Professor Bill Bruns. Every HBS MBA first-year required class has a 4-6 member teaching group faculty plus a doctoral student course assistant, who meet for at least an hour before teaching each classroom case. This is a required meeting no matter how many times a professor has taught the case. During the teaching group meeting, the case approach is discussed, and teaching notes shared. In effect, the teaching group is not only intended to maintain high quality MBA teaching, but also is intended to develop new faculty as effective case teachers, and keeps those that are experienced case teachers up-to-date and on their toes.

Bill Bruns was an MBA graduate of HBS, and was visiting HBS from the faculty of the University of Washington Business School. He had a special understanding of my plight, and was especially helpful to me in both learning the HBS culture and learning to become a competent case method teacher.[4] Bill's first advice to me was the best advice on case teaching that I ever received: "When you get in trouble during a class, just stop, and trust the class; inevitably, the class will come to your rescue, but you have to stop, wait, and be patient." Is that hard to do! But it works.

I got into a lot of trouble in case discussions during my first year: talking too much, cutting off students' comments that I did not fully understand, and the list goes on. I still get in trouble, but Bill's advice rarely fails me. It is when I try to wing it, when I got into deep trouble, and risk losing the confidence and trust of the class. Once trust is lost with a class that you expect high performance from, it is extremely hard to regain credibility.

I learned other lessons too about crafting a case. It is dangerous and often embarrassing to do too much interpreting when writing a case: dangerous because business cases are generally complex with a lot of things implied rather than explicit. Most cases involve underlying good stories, but the real stories are often opaque, and need to be discovered through discussions with class groups with diverse experiences—having a large class of 80 to 90 students means that on almost any subject a class member will know more than you and likely had a relevant personal experience on the subject under discussion. Too much personal interpretation by the professor when either writing or teaching a case tends to inhibit discovery by both students and the instructor.

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[2] Quality business cases do not come easily or cheap. The HBS full cost estimate for a quality case that becomes part of the HBS MBA curriculum is approximately $100,000.

[3] NACRA holds annual case writing conferences, publishes the *Case Research Journal*, and partners with Harvard, McGraw-Hill and others in making teaching cases and case method research and teaching widely accessible to other academic institutions and management professionals. For further information: http://www.nacra.net .

[4] After Bill Brun's two years visit to HBS, he joined the permanent faculty. Bill remained at HBS until his retirement, and appointment as an emeritus Harvard professor. He still travels the globe on behalf of HBS teaching other faculty the case method of teaching and the art of writing business cases.

In writing cases, it's important to get the facts right, talk to the right sources, and accurately describe key events, and context. The stories and characters of a case are the mechanisms enabling students to long remember management lessons after case facts have faded away from their memories. Maintaining Case Teaching Note files and networking with others that teach theirs and others' cases keeps your case teaching dynamic and fresh.

I have also learned that some really good cases seemingly last forever. For example, I was away from the Harvard Business School for 14 years while building our consulting firm, and then returned to teach the first-year MBA Accounting and Control course that I had taught during my first years at HBS. Returning to the HBS faculty, I saw new case names with more modern business contexts and numbers. But some of these cases were eerily familiar—that is, many of the key case issue were the same. When I read the new teaching note, I learned that the "new" case was an old case that had simply been artfully updated to reflect a changed environment and new numbers. The case discussion strategy was fundamentally the same. For example, one of these cases was a short case on transfer pricing policies and overhead allocations. The case over time had its exhibits boiled down to just a few numbers, but with an associated issue that defied resolution through rigorous analysis. The art of this case involved reducing the quantitative analysis required, making room for more class discussion of the far more important human judgments, which were required to make the transfer pricing system work. The 1-¼ pages case generated class discussion that could barely be contained in an 80-minute class period.

I was fortunate to have another experience that was associated with the power of the case method. In 1974, I left HBS with my research assistant and graduate of the HBS doctoral program, David Norton. Dave and I founded Nolan, Norton & Co., a management consulting firm specializing in IT strategy and management, which we grew and operated for 14 years before merging with KPMG. In building a headquarters office for our firm in Lexington, Massachusetts, we created a replica of an HBS classroom for 80 to 90 participants, designed to facilitate case interaction and discussions, along with 4 small group discussion rooms. Our consulting methodology included writing cases on our clients' issues, and bringing the client management team to Lexington to discuss their cases along with other associated HBS cases to facilitate learning and analysis of alternatives for the issues that the company was facing. We also extended this into multiple client company programs whereby we conducted multi-client case research and included guru faculty from HBS and other business schools to jointly discuss management issues. The companies that worked with us in this capacity included IBM, AT&T, GE, Cisco, Shell, BP, DuPont, Phillips, Boeing, Apple, drugstore.com, Boeing and the like.

One of the more familiar NNC research projects that came out of this multi-client research was the balanced-score card methodology whereby David Norton worked with HBS Professor Robert Kaplan in case research in going beyond financial performance metrics. Both Dave and Bob went onto publish a series of field cases, *HBR* articles, and Harvard Business Press books on the subject and methodology.

As important as the case method lessons that I have learned, is that like business itself to remain vital and relevant, cases and case teaching must change with the environment and times. And, now is a most exciting and challenging time for creating effective business cases due to breakthrough innovations that are proliferating in digital media, and global possibilities for expanding the form and use of cases.[5] So it is my privilege to share some of the work that my colleagues and I have being doing here with the hope that some of the ideas might be useful to each of you as you endeavor with your own continuous learning curves on creating effective business cases. Here, I would like to share with you some of our recent work on the idea of a fictional, or novel case format, digitization of case media, and coping with some of the challenges in multi-media mixed format cases. This is not about writing arm-chaired cases; it is a process that is built on a foundation of field case development, and then going beyond the individual set of field cases, by crafting elements to extend the case method into a set of integrated cases and coherent story.

Our journey in creating a novel based on an integrated set of field cases began with the scenario whereby a promising functional line manager of a corporation is asked to assume management responsibility for a different function in his/her development towards assuming general management responsibilities, and possible consideration for the top executive position of Chief Operating Officer or Chief Executive Officer. In this first book (*Adventures of an IT Leader*), we have the protagonist, Jim Barton, a successful Loan Officer of a financial institution, being asked by the CEO to become the financial institution's new CIO.

[5] Review of the NACRA 2013 case précis' for this conference is impressive evidence of the diversity in use, techniques, and global scope of business cases, and the coming together of case method professors in learning from each other.

With the classroom success of *Adventures*, we continued the saga of Jim Barton becoming a Twenty-first Century CEO in a different corporation with our second book: *Harder Than I Thought*. *Harder* employs the same format of creating a set of case based chapters, and then integrating the cases into an extended case study of 20 chapters on dealing with the issues of becoming a successful CEO. These issues and chapters include building a collaborative executive leadership team, global outsourcing, strategic partnering, and working with and restructuring the board of directors.

Partially as a result of our research for *Harder* and partially from our experiences on board of directors, we expanded our author team and we are currently working on a third novel book continuing Jim Barton's corporate leadership challenges into reinventing boards of directors for the twenty-first century.

Use and advantages of a "novel" case format: IVK Case Series and *Adventures of an IT Leader*
Upon returning to the HBS faculty in 1991, we hired Professor Rob Austin, who joined the faculty after a 10-year stint as a CIO at Ford Motor Company. Rob and I began a case writing program to capture the breadth of issues facing practicing CIO's with our objective of compiling the cases into a book for teaching the emerging body of knowledge on IT strategy and management. We also hired a previous colleague of Rob's as our research assistant, Shannon O'Donnell. Rob holds a master's degree in Theater, and earlier had met Shannon, who had been a scriptwriter and director at the Philadelphia Repertory Theater.[6]

During our case writing, Shannon was instrumental in addressing two problems that we encountered. The first had to do with obtaining case releases on the sensitive IT issues involved in our cases. Some case situations turned out badly, and getting companies to sign release forms for distributing and teaching the case studies often ran into trouble as senior managers were asked to sign the releases.[7] The second problem was that our collection of IT cases were from different industries, which meant that there was a pre-case setup time required by students to learn about industry structure and context. While there were obvious learning benefits from this, we discovered that learning many industry contexts raised a pedagogical issue; the balance between learning and discussing industry context limited the time to adequately focus on the IT issues. Shannon suggested a way that we might cope with these two problems, as well as an innovation that could enhance the effectiveness of our overall project.

Shannon suggested that we develop an integrated case series, using a single industry for the context of all the cases in the series. This seemed workable to us because the IT issues were relatively common across industries. To cope with the release issue, she further, suggested that we use a fictional novel case format, but based on the foundation of the issue as the issue played out in the real companies that we studied—similar in form to the fictional novels written by noted authors such as James Michener.[8]

Finally, Shannon observed that our current collection of cases could be organized into the classic story format based on Joseph Campbell's monomyth, or the "hero's journey"-- a basic pattern that is found in many narratives from around the world.[9] The advantage of applying the monomyth structure had the considerable benefit of enabling us to craft our case characters to further engage our students in the work of the characters and by extension and projection, their human characteristics in conducting their work. And, of course, human value systems and past experiences play into the judgments people make in their decision-making.

Working with this format, we created our hero, a line executive who we named Jim Barton, employed by a fictional financial service firm (IVK) that was experiencing a financial crisis and in the throes of turnaround mode. Jim Barton is asked by the new CEO to assume the CIO position, which is seen as pivotal to the turnaround. With no formal IT background, Barton is

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[6] Rob Austin is a chaired professor and Shannon O'Donnell is an assistant professor at the Copenhagen Business School where both are involved in an innovative program at CBS in integrating the Arts into research and study of management.

[7] Often if a senior manager was concerned about releasing the case, he/she would consult the company's law department. Inevitably, the release process became more complicated, drawn out, and conservatism transpired where important case content was asked to be edited out, or release permission was simply denied.

[8] James Michener wrote engaging novels such as *Hawaii* and *Alaska* based on his extensive historical research on these states.

[9] Joseph Campbell, *The Hero with a Thousand Faces*. Princeton: Princeton University Press, 1949. In a monomyth, the hero begins in the ordinary world, and receives a call to enter an unknown world of strange powers and events. The hero who accepts the call to enter this strange world must face tasks and trials, either alone or with assistance. In the most intense versions of the narrative, the hero must survive a severe challenge, often with help. If the hero survives, he may achieve a great gift or "boon." The hero must then decide whether to return to the ordinary world with this boon. If the hero does decide to return, he or she often faces challenges on the return journey. If the hero returns successfully, the boon or gift may be used to improve the world. The stories of Osiris, Prometheus, Moses, Gautama Buddha, for example, follow this structure closely. (See Monomyth Website, ORIAS, UC Berkeley accessed 2013-08-21). Perhaps, the most famous use of Campbell's hero's journey was the producer of the movie *Star Wars*, George Lucas.

reluctant, but he decides to set off on his "hero's journey" to learn how to be an effective CIO, and manage the IT function to facilitate the turnaround of IVK.

Our draft field cases on IT management and strategy issues provided the foundation for eighteen IVK cases paralleling Barton's "hero's journey" and integrating a cast of characters along the way. For each case, we developed a teaching note. Then Rob and I with assistance from Shannon, taught MBA, undergraduate, and ExecEd courses on IT strategy and management in our respective classes: at the Harvard Business School, the University of Washington Business School, and Copenhagen Business School. We took careful notes on our teaching experiences and revised both the cases and teaching notes.[10] During this project, we were simultaneously working on a conference series at the University of Washington: The Seattle Innovation Symposia (SIS). Results from the SIS were used to develop a series of TV programs for the University of Washington Educational Channel (Channel27) that were also released widely in the USA and other countries through the Public Broadcasting Research Channel. These program segments are still actively broadcast, and are available through the University of Washington TV web site.[11]

Two of the SIS TV program segments are particularly relevant to our IVK cases and *Adventures of an IT Leader* book. The first is a segment shot at the SIS, in which Rob Austin, Shannon O'Donnell and I explained the theory and practice of our IVK novel initiative: *Digital Natives in IT Learning*.[12] In the second TV segment Rob Austin and I demonstrated to the SIS attendees the use of a printed chapter/case (IVK Chapter 10) discussion, followed immediately by a short in-class audio chapter/case (IVK Chapter 11, read by Shannon): "*Technology Leadership*."[13] In this simulated class, students discuss a recommended course of action developed by the IVK IT team, then listen in to the CEO's meeting in which the course of action is discussed and the CEO dramatically decides to take a different tack. In these combined cases, students "walk in the shoes of the IT team" and then are forced to "walk in the shoes of the CEO."

During the discussion of Barton's IT team thinking, most students agree that this is the course of action that IVK should take. When the students learn of the CEO's overruling of the IT team's decision and are asked to consider why the CEO chose an alternative course of action, only about half of the students are able to make the transition of "walking in the shoes of the CEO" and change their position to the CEO's perspective. Students actively experience and learn that once making up your mind on a decision, the natural tendency is to defend the decision that you first made and be highly critical of an alternative course of action. It is often difficult to fully listen to another course of action, and then resist reacting defensively once you have earlier made up your mind.

With a grant from Novell, we also put up a web site with the assistance of the IT staff at the University of Washington making our IVK cases, teaching notes, course outlines, and an IVK blog available to a set of colleagues, and other IT professors interested in using all or some of the IVK cases in IT courses. Some professors had tailored their own IT courses to emphasize various themes and IT issues, and chose to use selected IVK cases to address some IT issues and not others.

Simultaneously with our IVK project, we entered into a contract with Harvard Business School Press to publish the individual cases, make the teaching notes[14] available through Harvard Business School Publishing, and publish a Harvard Business Press book: *Adventures of an IT Leader*.[15] Our book editor, Kathleen Carr, was enthusiastic about the project, and made a number of important contributions such as facilitating graphics for the book cover, and character scenes for the beginning of each major part of the book. Since a major objective of the book was to embrace the body of knowledge on IT strategy and management, we incorporated the concept of Jim Barton's living white board, where he kept a running list of key IT strategy and management concepts/principles, and as he continuously learns, he updates his white board. We crafted "Reflections" at the end of each chapter, and have used the ending white board in a course final examination asking student to derive their set of key concepts and principles for developing an IT strategy and a set of IT management principles for executing their strategy.

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[10] Shannon served as our research assistant and attended our classes and also took careful notes. She also engaged students after the classes to further discuss their thoughts, and she administered an evaluation instrument surveying students about their class and IVK case experiences. The survey results were reported in Austin, Nolan, and O'Donnell, "The Technology Manager's Journey: An Extended Narrative Approach to Educating Technical Leaders," *Academy of Management Learning and Education*, Vol. 8, No. 3, 337-355.

[11] http://uwtv.org/series/17392905/ This SIS web site includes the program segments produced during SIS. Accessed by Richard Nolan on August 23, 2013.

[12] http://uwtv.org/series/17392905/watch/16212760/ Accessed by Richard Nolan on August 23, 2013.

[13] http://uwtv.org/series/17392905/watch/16212454/ Accessed by Richard Nolan on August 23, 2013.

[14] The IVK individual cases/chapters and teaching notes are available from hbsp.harvard.edu ; search on "Adventures of an IT leader."

[15] Robert D. Austin, Richard L. Nolan, and Shannon O'Donnell, *Adventures of an IT Leader* (Boston: Harvard Business Press, 2009).

During the course of the project, we worked with HBS IT Video professional Tom Ryder, to develop an audio version of the book, for which Shannon read the chapters, and we posted them on Apple's iTunes, making the audio chapters globally accessible to our HBS ExecEd course participants in advance of the Delivering Information Services course. We learned that a number of executive attendees who spoke English as their second or third language, used the audio chapters in different forms: some listened to each chapter, others listened while they also read the chapters. Their collective responses were that having the audio chapters facilitated their comprehension of key ideas.

Continuing Jim Barton's Hero's Journey: *Harder Than I Thought*
With encouragement from our Harvard Business Press editors, we launched a sequel to Jim Barton's hero's journey: *Harder Than I Thought: Adventures of a Twenty-First Century Leader*.[16] Jim Barton's hero's journey continued, facing a turnaround challenge in a corporation in the aerospace industry.

By the turn of the century, corporations had become huge in size, scope, and global economic impact. Information technologies had matured to the point that the pace of elemental transactions was almost instantaneous, collapsing the viability of long-term strategy formulation. The majority of consumers were characterized by growing up with IT—referred to as digital natives, while the older generations of digital immigrants were fading into a minority of consumers and corporate leaders. Corporations were forced to become collaborative and continuous learning organizations. The new hero's journey plight of Jim Barton was to lead a struggling military cargo airplane manufacturing company into this new, full-fledge corporate reality of the twenty-first century.

To create the context for this novel project, we concluded that a leading edge technology-based industry was important to highlight the key issues of corporate executive leadership. At the time, Boeing and Airbus were fighting for industry leadership in the commercial airplane industry. Shortly into the twenty-first century (2003), Airbus had surpassed Boeing in the number of commercial airplanes delivered, as well as size of orders backlog, and was deemed the new industry leader, surpassing Boeing which had held the number one position for more than 50 years.

In response to the Airbus competition, Boeing designed a light composite, fuel efficient, commercial airplane, to be manufactured with a massive global outsourcing strategic partner process. Some likened the new airplane to be an industry "game-changing" airplane in a similar way to Boeing's 707, which was the first successful jet propelled commercial airliner launching Boeing's long industry leader position during the last half of the twentieth century. The new Boeing airplane, futuristically called the Dreamliner, was later formerly designated the Boeing 787.

To successfully undertake our *Harder* book project, we were challenged with a significant task of researching commercial airplane industry competition and the recent change of industry leadership as well as Boeing's challenge in gaining back its lost industry leadership position. This required both secondary research and primary research, including interviews with commercial airplane manufacturing leaders.[17] This background research was especially important in getting Rob, Shannon and I to a relatively deep understanding of the industry competition, and key decisions made by the executive leaders in the competing corporations. Even though the three of us were often located in different countries, we engaged in numerous Skype video conference calls discussing the airplane manufacturing competitive decisions and the background/analysis for making the decisions.

Our extensive background research provided the foundation to tackle twenty-first century executive and board leadership, which we then wove into Jim Barton's hero's journey at the fictional SMA (Santa Monica Aerospace) Corporation. Barton's

[16] R. Austin, R. Nolan and S. O'Donnell, *Harder Than I Thought* (Boston, Harvard Business Press, 2013). This book is also available in hard cover, Kindle edition, and audio from Amazon.

[17] The extended case study of a company has been a practice at the Harvard Business School for many years. It took several forms at the Harvard Business School ranging from a series of cases such as Professor David Yoffie's cases on Microsoft (Yoffie 1992,'95, '96, '97, '98' '99, 2000, '02, '05) and Apple (Yoffie '95, 2002, '04, '05, '06, '08, and '12). A second variant had a number of case authors writing HBS cases on various topics on one company such as the General Electric Corporation. For more than 30 years numerous HBS GE cases have been written. A third variant involved historians publishing academic articles in the quarterly *Business History Review*, which began publishing in 1926 and in 2011 became a joint partnership with the Harvard Business School and Cambridge University Press. A fourth variant has been the publishing of books on corporations and their executive leadership by university presses including the Harvard Business Press. The fourth variant as a viable publishing opportunity seems to have significantly declined during the last decade with decreasing university budgets in general, and the pressure that is being brought to bear by digital media on traditional book publishing.

journey begins with becoming a member of the SMA board of directors, being elected to chair the board's governance committee and leading the search for a turnaround CEO. With no "takers" for the CEO job, Barton is pressed into taking the CEO job himself. We then trace Barton's first day as a CEO through his journey of turning the corporation around by designing and manufacturing a successful commercial cargo airplane. A set of 20 CEO issue/decision chapters follow.

In addition, we brought back the living white board from our *Adventures* book, but in a different form, to serve as a mechanism for additional perspective on implications of CEO leadership decisions. This new form employs simulation and avatars of the cast of characters to amplify their individual characteristics, which provide "interludes" for the main parts of the book:

The Lords of Leadercraft
A Leader of Men
Your Lineup is a Mess
Execute, Execute, Execute
The Leadership Main Course
Still Figuring It Out

These interludes are created as videos played privately in Jim Barton's office, and are staged to allow both Jim Barton and the reader to step out of the reality of their current situations, and experience a different view and perspectives of the situation and the various CEO issues and decisions. By amplifying the individual characteristics of the characters, we intended to particularly highlight human characteristics as might influence discussions and decisions.

In *Harder*, we expanded Jim Barton's purview further in restructuring his board of directors, and establishing global strategic partnerships including an aggressive Japanese outsourcing strategic alliance. We also continued to use Reflections at the end of each chapter as a basis for reader contemplation, and suggested classroom discussions.

Current Jim Barton Project: *Reinventing Boards of Directors* (working title)
During our research and case writing over the past 5 years including *Adventures* and *Harder*, we have concluded that corporations have grown to reach sizes and complexities whereby they have outgrown the form and workings of their board of directors. Especially in the United States, the common corporate practice of having CEO's also serve as board of director chairs, has impeded the restructuring of board membership to provide the experience and skills required to discharge the fiduciary duties of the board in carrying out effective oversight of corporate leadership to shareholders, employees, and society. Accordingly, we have concluded that Jim Barton hero's journey requires one more book-length episode in tackling the challenge of reinventing boards of directors. This hero's journey is turning out to be Jim Barton's ultimate challenge, as well our author team's ultimate challenge.

To take on this ultimate challenge, we are privileged to have expanded our team with one of the most talented HBS case method teachers and case writers: Professor F. Warren McFarlan. Warren has not only distinguished himself at HBS, but also has distinguished himself as an authority on serving on nonprofit boards[18], as well as USA and international boards.

With our expanded team, we now join Jim Barton as he takes stock of his career as a corporate executive, CEO with a clipped short tenure due to his own making, and now driven to make a positive contribution to improving corporate governance.

We pick up on Jim Barton's saga as he is contemplating his future after being forced to resign as CEO of Santa Monica Aerospace. During his contemplation, Barton is approached with opportunities to serve on several boards of directors. It is during his pursuit of these opportunities that Barton reflects on his own personal experiences with corporate boards and earlier serving on boards. He concludes that board service, and participating in an overall movement of reinventing boards of directors is something that he is not only vitally interested in, but something that he might be able to make an important contribution. So once again, Jim Barton embarks on another hero's journey.

Summary and Conclusions
So I have been privileged to have stumbled into case method teaching and case writing, and have found both a wonderful career and a continued challenging experience. I hope that my experience might inspire some of you to continue to engage in the innovations required to take the case method into the twenty-first century, and likewise inspire your students to engage in continuous learning about corporations, management, and board oversight.

[18] See for example Epstein, Marc J. and F. Warren McFarlan, *Joining a Nonprofit Board* (San Francisco: Josey-Bass, A John Wiley Imprint, 2011).

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