NACRA
North American Case Research Association

2016 Proceedings
of the
North American Case Research Association

58th Year
October 6–8, 2016
Harrah's Las Vegas Hotel, Las Vegas, Nevada

Volume 30, Number 1

Dr. Kathy Savage, Vice President of Programs
NORTHERN ARIZONA UNIVERSITY
The W. A. Franke College of Business

Contents

PLENARY SESSION–PRESIDENT LEN JESSUP, UNLV

Len Jessup joined UNLV as its 10th president in January 2015. An accomplished leader in higher education, Jessup brings experience as a university professor, administrator, entrepreneur and fundraiser. Jessup was the first in his family to graduate from college. This experience informs his understanding of the crucial role universities play in transforming families and communities, and it has been a motivating factor in his career in higher education leadership.

Prior to UNLV, Jessup served as dean of the Eller College of Management at the University of Arizona (2011–2014), where he was also professor of entrepreneurship and innovation and the Halle Chair in Leadership. He led Eller to become a self-sustaining college with higher national rankings that robustly contributes to the state's economic development. As a founding board member of the University of Arizona Health Network, he also contributed to the rethinking and restructuring of the university's academic medical center.

Jessup is a leading researcher in management information systems, with a focus on the use of emerging technology in higher education and business, new venture strategies, and social entrepreneurship. He was instrumental in creating the University of Arizona's technology transfer and commercialization program, *Tech Launch Arizona*. He led the development and expansion of online degree and executive education programs at Arizona and helped drive similar innovations in previous positions at Washington State University (2000–2011) and Indiana University (1995–2000).

During more than a decade at Washington State University, Jessup was tapped for a variety of leadership roles. As dean of the WSU College of Business, he led a complete two-year reengineering of the business program, which included university-wide Entrepreneurship and Innovation Initiative that created intra-university pipelines between colleges to make the most of new ideas. As vice president of university development and president of the WSU Foundation, he transformed the university's fundraising efforts, helping to double overall fundraising totals and welcoming record numbers of donors to the university.

A former baseball player in the highly competitive California junior college system, Jessup received his B.A. in information and communication studies in 1983 and his MBA in 1985, both from California State University, Chico. He earned his Ph.D. in organizational behavior and management information systems from the University of Arizona's Eller College of Management in 1989, and was awarded the Outstanding Ph.D. Alumnus in 2004.

Jessup resides with his partner Kristi Staab, a former broadcast industry executive who owns and operates a successful leadership and sales training and development business. Jessup has a daughter, Jamie, and a son, David.

PAUL R. LAWRENCE FELLOWSHIP WORKSHOP

Session Chairs
Anne Lawrence, San Jose State University
Peggy Naumes, University of New Hampshire

The Paul R. Lawrence Fellowships are awarded to distinguished early-career academics who are interested in developing their skills in case teaching, research, and writing. Doctoral students and faculty who were in their first three years of a tenure track appointment were eligible to be considered for a Paul R. Lawrence Fellowship. Selected recipients were given travel support and an invitation to attend the Paul R. Lawrence Fellowship workshop. This year's recipients were selected from an outstanding pool of applicants from around the world. The Paul R. Lawrence Fellowships are sponsored by the Case Research Foundation.

2016 Fellowship Recipients

Maria Ballesteros-Sola, Doctoral Candidate, IE Business School, Madrid, Spain
Field: Social Entrepreneurship

Erin Bass, PhD, Assistant Professor, University of Nebraska, Omaha, USA
Field: Strategy/Leadership/Ethics

Anjan Ghosh. Doctoral Candidate, Indian Institute of Management (IIM) Calcutta, India
Field: Strategy/Organization Theory/Nonprofit Management

Ebru Ipek, Doctoral Candidate, Simon Fraser University, Vancouver, Canada
Field: International Business/Cross-Cultural Management

Mansur Khmatov, Doctoral Candidate, Ivey Business School (Western Ontario), Canada
Field: Marketing/Consumer-Brand Relationships

Elizabeth Ontaneda, Instructor and Head, Case Study Center
Universidad Peruana de Ciencias Aplicadas, Lima, Peru
Field: Urban Planning/Development

Satyam, Doctoral Candidate, Indian Institute of Management (IIM) Lucknow, India
Field: Marketing/Base of the Pyramid

Valoris I. Smith, DBA, University of West Indies, Mona, Jamaica
Lecturer, University of Technology, Jamaica
Field: Finance

George Tackie, Doctoral Candidate, University of Ghana
Assistant Professor, University of Cape Coast, Ghana
Field: Accounting

Irina Toteva, Doctoral Candidate, Florida Atlantic University, USA
Field: Marketing/Consumer Behavior/Social Media

START-UP CASES' AND NEWCOMERS' WORKSHOP, NACRA 2016

Track Chairs
Cynthia Ingols, Simmons College
Chris Cassidy, Sam Houston State 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 and writing, including managing your site location, interviewing in the field and researching in the library, the development of a theoretically grounded instructor's manual with concise learning objectives, and preparing to submit your work to conferences, textbooks, and journals.

Mentors

Mentors are experienced case writers who advise new authors on how to move forward from an interesting case idea and to the process of case writing and the development of an instructor's manual with learning objectives and applicable theoretical materials to a publishable case and useful IM.

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

Carolyn Conn, St. Edward's University
Timothy Edlund, Morgan State University
Lisa Eshbach, Ferris State University
John Gamble, Texas A&M University – Corpus Christi
Gina Grandy, University of Regina
Janis Gogan, Bentley University
Joe Kavanaugh, Sam Houston State University
Jim Kennelly, Skidmore College
Anne Lawrence, San Jose State University
John Lawrence, University of Idaho
Bill Naumes, University of New Hampshire
Peggy Naumes, University of New Hampshire
Grace O'Farrell, University of Winnipeg
Marlene Reed, Baylor University
Linda Swayne, University of North Carolina - Charlotte
Ram Subramanian, Stetson University
Gina Vega, Organizational Ergonomics
Susan White, University of Maryland

NACRA 2016 Start-Up Cases Workshop Participants

Author(s)	Case Title
Maria Ballesteros-Sola	Black Sheep Food: Choosing the Right Legal Structure for Mission-Driven Ventures
Erin Bass Haley Shelton	Overseeing the World's Game: FIFA, Governance, and Stakeholders
Sarah Cabral	Whole Foods CSR Case Study
Candice Deal Darell Singleterry	JetLink Adventures Bahamas
Gwyneth Edwards	Vacation Ownership in the 21st Century: the Case of DRI, Intrawest and 22,000 Members
Iris Gersh	Hyatt Times Square, New York, New York
Anjan Ghosh	Becoming Hybrid: The Roller Coaster Ride of CINCOMM
Kendra Hart	Sunny Side Up: Residential Solar Panels in Mexico
Ebru Ipek	Cross-Cultural Awareness and Competence
Andrew Johnson	Tesla Motors and the External Environment
Mansur Khamitov Matthew Thomson	Ambro Cough Syrup: Dealing with Capacity and Out-of-Stock Issues
Nadir Kolachi	Stretching Strategic Wings Between Two Giants: A Case Study of Air Arabia
Mary Dand Laird Jim Zboja Jeff Paul	This Is Not What I Saw on HGTV
Jose Lam Blair Winsor Jacqueline Walsh	Quidi Vidi Brewing Company: Regional or International Expansion?
Jose Lam Jacqueline Walsh Blair Winsor	Consilient: Failure's Virtues
Monica Law	Why Cannot We Work Together?
Atherine Lee	If It Isn't Broken, Don't Fix It: The Story Of New Regulations for Jamaican Credit Unions
Yoo-Taek Lee	Developing a Socially Responsible Shrimp Supply Chain: A Case of Sekar Group in Indonesia

Start-up Cases Workshop Participants (continued)

Author(s)	Case Title
Elizabeth Otaneda **Guillermo Quiroga**	Vania Masias and her D1 Cultural Association
Satyam	Sairpur Bazaar: Challenges and Way Forward
Roberta Sawatzky **Kyleen Myrah**	Succession Challenges at John Howard Society: How to Preserve a Servant Leadership Approach
Savita Shankar **Masa Okada**	Japan Fibres: Trying to Create Shared Value in Japan and India
Valoris Smith	Access Financial Services Limited: Capital Structure Dilemma and CEO Fighting to Retain Control of the Company
George Tackie	Integrity in the Accounting Profession: Who Watches the Watchman?
Lorraine Taylor	Managing the Host-Guest Relationship Near the Hollywood Sign
Irina Toteva	The Future of Nintendo: Pokemon Go or Gone
Theresa Reinhard **Mary O'Rourke**	Ellen Kullman and Change at DuPont
Deborah Walker	Overtime Pay and the New Rules
Meredith Woodwark	He Did What? Managing the Aftermath of Colleague Suicide

CASE ROUNDTABLE PRESENTATONS

ACCOUNTING, FINANCE AND ECONOMICS

Chair: Susan White, University of Maryland
suwhite@rhsmith.umb.edu

TREET CORPORATION PARTICIPATION TERM CERTIFICATE

Atif Saeed Chaudry and Sana Iqbal
Lahore University of Management Sciences

Case Objectives and Use

This case can be used as a capstone case in a corporate finance course that summarizes all the valuation methods used to value a security. It can also be placed to be taught in a class meant for valuing hybrid securities. It can also be set as a case to test students in a Final exam of corporate finance/valuation course.
The main pedagogical objectives of the case are:

1. Understanding how to value a convertible hybrid security?
2. Making students understand the importance of valuing a security that has tiered cash flow structure whose risk levels are different.
3. How to value equity like cash flow?
4. How to estimate beta for CAPM?
5. How to estimate cost of debt?
6. Use binomial method using risk neutral probabilities to value state contingent cash flows
7. Make students understand that there could be cash flows that neither look like debt cash flows nor equity cash flows: their riskiness can be different from both!

Synopsis

In backdrop of past aggressive growth strategy by Treet group and lack any significant returns to shareholders, Amir Zia, the CFO of the group was contemplating various options for adding value to the shareholders wealth through financing decisions. Despite a lot of investment projects taken up by Treet group in the past, the effects of these projects were not showing up in stock price (see Exhibit 8). Treet had been relying on plain vanilla Term Finance Certificates (TFCs) and bank borrowings to finance working capital and some part of capital expenditures.

Borrowing through either was not only easy but also a relatively cheaper source of capital, as interest payments on debt are tax deductible. Tax savings on interest directly accrue to the shareholders, thus adding to the shareholders wealth. However, further increase in leverage might destroy value for the shareholders due to threats of bankruptcy. Moreover, banks were only willing to lend at floating rate interest payments that were linked to KIBOR. Increase in debt with an increase in the already high interest rate would put further strain on debt servicing. Amir had little time on his had to propose a financing plan that could add value to the shareholders wealth, as the next board of directors meeting was scheduled in September 2012 – just two weeks away. Amir had to present a feasible plan in this meeting to keep all the shareholders happy.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Atif Saeed Chaudry, Lahore University of Management Sciences, DHA Lahore 54792, Pakistan, 923445326666, atif.saeed@lums.edu.pk.

THE ALMOST PERFECT CPA

Carolyn Conn and Fred Tedesco
St. Edward's University

Case Objectives and Use

The case is appropriate for an upper-level undergraduate or graduate course in auditing or accounting ethics. Although the situation involves the accounting profession, it can be utilized for any major in which students will graduate and enter a profession (such as law or medicine) and for which there is a government agency with regulatory authority for the ethics and conduct of members of the profession. Issues in the case should be understandable for both accounting majors and non-accounting majors. The objectives for all majors include:

- Exploring the dilemma a professional person (such as a CPA, lawyer, doctor) has regarding their duty to clients versus duty to family.
- Evaluating the duty a regulatory body (such as a state accountancy board) has to protect the public interest and maintaining the public trust in the profession.
- Appraising whether personal tragedy should give a professional (such as a CPA) "some slack" if he or she does not meet all their professional obligations.

Additionally, students who are accounting majors should be able to do all of the above plus the following:

- Explain what is meant by "protect the public interest" and "maintain the public trust" for members of the accounting profession and why these concepts are so important.
- Describe why a code of ethics is important for the accounting profession.
- Explain the importance of an engagement letter for all clients and the importance of documentation in all aspects of an audit as well as client communication.
- Evaluate when an auditor should resign from an audit engagement due to personal issues that might hinder the quality of work or meeting deadlines.

Synopsis

This case is about an ethical dilemma faced by a CPA – whether to admit guilt to multiple allegations by the state's Attorney General (AG) or to fight the matter in court. The protagonist *knows* he is not guilty of some of the charges against him, including a charge of lacking competence.

The protagonist's decision is complicated by a tragedy in his family. His wife and partner in the CPA firm, was diagnosed with breast cancer and he had to complete an audit she was doing for a new client. It was the new client who filed the complaint. From the protagonist's perspective, the few things he missed in finishing up the audit were minor. The positions of the SAB and the AG were that his expertise was in tax, but not in audit. Thus, he violated the competence aspect of the *Ethics Code*. He had an obligation to protect his client's and the public interest.

"Almost perfect" was not good enough. This situation highlights the challenges a state accountancy board (or similar regulatory body) has in protecting the public interest, particularly in light of a member of the profession experiencing a personal tragedy that may have adversely affected their professional work.

The authors developed this case for class discussion rather than to illustrate either effective or ineffective handling of the situation. Names of people and institutions have been disguised extensively. The case, instructor's manual, and synopsis were anonymously peer reviewed and accepted by the North American Case Research Association (NACRA) for its annual meeting, October 6-8,2016, Las Vegas, NV. Contact person: Carolyn Conn, St. Edward's University, caroltc@stedwards.edu.

DIRTY OIL OR A NATIONAL TREASURE?
Accounting for Environmental Liabilities in the Canadian Oil and Gas Sector

James Moore, Wilfrid Laurier University
Thomas Schneider, Ryerson University

Case Objectives and Use

This case is particularly suited to the earlier phases of an MBA financial statement analysis course when the effects of differences in accounting policies is typically studied.

The objectives are:

1. To help students to understand the financial statement treatment of environmental liabilities and other asset retirement obligations. The case requires students to describe and apply financial reporting requirements for environmental liabilities.
2. To help students understand how differences in discount rates can impact the accounting measurement of assets, liabilities and income. Students consider differences in discount rates and how they impact the initial amount recorded for assets and liabilities and the subsequent impact of these initially recorded amounts on income.
3. To expose students to differing levels of reporting quality and to consider the motivations for differing levels of reporting quality. Some of the firms in the case provide better disclosure of their environmental liabilities than others.
4. To expose students to the accounting standard setting process and its potential flaws.
5. To expose students to the Canadian oil and gas sector. Canada has large reserves of oil and gas, but extraction raises many environmental concerns. Students may raise ethical concerns over the industry.

Case Synopsis

In April 2012, Steve Davies' boutique investment firm was updating its earnings forecasts for four Toronto Stock Exchange traded oil and gas companies. All four firms had recently adopted International Financial Reporting Standards (IFRS). The meeting participants noticed differences in disclosure and calculation relating to environmental provisions in the notes of the four companies 2011 financial statements. Steve was asked to explain how environmental provisions are calculated and to explain how differences in discount rates can impact reported earnings over the life of an oil and gas project. Steve also noted some differences in the way the adjustments the four firms made when converting from domestic Canadian accounting principles to IFRS.

The case starts off with a generic approach by asking students to show how a future environmental liability of $1 is accounted for over the life of a project involving an environmental or other asset retirement obligation. Students then show how the expense recognition differs under higher (6%) and lower (3%) interest rates. Students then explain the transition to IFRS and how reducing interest rates as part of the transition increases future earnings. The analysis then moves to the four specific companies and addresses the impact of any IFRS transitional adjustments on future earnings and evaluates the environmental disclosures of the four firms in their 2011 financial statements.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: James Moore, Wilfrid Laurier University, 75 University Avenue West, Waterloo, Ontario, Canada, 519-884-0710 ext 5448, jamoore@wlu.ca.

DIGICEL IP$_N$O

Paul Golding
Clavery Allen
Locksley Henry
Andrea Sutherland
University of Technology, Jamaica

Case Objectives and Use

The case may be taught to final year undergraduate students or introductory courses at the graduate level in Corporate Strategy or Corporate Finance course for teaching valuation, capital structure and corporate strategy. The primary objective of the case is for students to understand how to analyse the many variables that simultaneously affect a company's decision making process.

This teaching plan has three sections based on the topic areas, Corporate Strategy, Valuation of a Private Company and Capital Structure, each with different pedagogical objectives

Synopsis

Digicel Ltd is one of two major players in the mobile telecommunications industry in the Caribbean started operation in Jamaica in 2001 offering mobile phone services. The company has been expanding in the Caribbean and Central America since and in 2015 made a major strategic move to expand into the areas of entertainment and broadband. Much of the expansion, through acquisition, has been financed by debt and in 2015 the company decided to float an IPO with proceeds earmarked to be used for expansion and reduce the debt on the balance sheet.
The IPO created a dual class share structure which resulted in Mr O'Brien maintaining control of the company. Three weeks after the offer the Company decided that the market was too volatile and they would be required to sell the shares at a significant discount, so the IPO was withdrawn.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Andrea Sutherland, University of Technology, Jamaica, 237 Old Hope Road, Kingston, Jamaica, 876-322-6669, atsutherland@utech.edu.jm.

AUGUSTA TRAINING SHOP: SNOWFLAKES

Alisia Holsey, Augusta University
Kelsey Smith, Augusta University
Dantavious Whitaker, Augusta University
Simon Medcalfe, Augusta University

Case Objectives and Use

Students calculate fixed and variables costs of production for hand crafted snowflakes, a product of a nonprofit. Using this information students will discuss whether to continue operation, and if so, what pricing strategy to follow. The unique characteristics of the Augusta Training Shop inform the discussion of strategy. This case is appropriate for a variety of microeconomics courses (principles, intermediate, managerial) at the undergraduate level. It is also appropriate for a foundation course prior to an MBA program.

Synopsis

The Augusta Training Shop was a non-profit organization that provided jobs for individuals with disabilities. In 2012 the workers started producing craft snowflakes made from reed. The snowflakes were sold online, in the shop, and at trade shows. The Executive Director, Audrey Murell, was attending a trade show in Atlanta and was asked if she could give a 50% discount to a wholesaler. Despite having produced and sold snowflakes for a couple of years Audrey realized she did not know how much it cost her to make them. She didn't know what to reply.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Simon Medcalfe, Augusta University, James M. Hull College of Business, 1120 15th Street, Augusta, GA 30912, 706-667-4541, smedcalfe@augusta.edu.

THE MOST HATED CEO IN AMERICA

Michael Jones, University of Cincinnati

Case Objectives and Use

The case and the teaching note were written for a Managerial Economics course for MBA students. The study questions reflect issues of price discrimination, consumer demand, government regulation, and other relevant economic topics. As an economics case, the learning objectives for the case include:

- Discuss the purpose of a business as well as its corporate social responsibilities
- Understand monopoly pricing, price discrimination, and limit pricing
- Assess how the elasticity of a good will affect corporate revenue
- Describe the direct and indirect burden of higher prices
- Analyze the short-run and long-run costs and benefits for government intervention and regulation

While the case was written with an economic audience in mind, the case would also be appropriate for a business ethics, marketing, public policy, or strategy course for MBA students.

Synopsis

In the fall of 2015, the CEO of Turing Pharmaceuticals announced that the price of its drug, Daraprim, would increase by over 5,000%. While the short-term effect on profits would be substantial, the company was facing a long-term disaster. The CEO, Martin Shkreli, was constantly in the media flaunting his pricing strategy as a way to maximize Turing's profits. Considerable coverage from the media and even the government was painting the company in a particularly negative light. If the company maintained this pricing strategy, the FDA might decide to take action. The Chairman of the Board, Ron Tilles, had to decide how to handle his notorious CEO, manage the public relations campaign for the company, and address potential competition from compounding pharmacies and overseas imports.

The author developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Michael Jones, University of Cincinnati, 324 Lindner Hall, Cincinnati, OH 45219, 513-556-2491, m.jones@uc.edu.

VANDERVILLE PLASTICS COMPANY

Pascale Lapointe-Antunes, Brock University
Deborah McPhee, Brock University

Case Objectives and Use

The case is primarily for use in graduate level human resource management or accounting courses. It can also be used in executive training. The case was classroom tested in human resource management and accounting, and student feedback has been incorporated where needed.

The objective of the case is to introduce students to how fraud can be perpetrated in a small business where internal controls are not legislated. After solving the case, students will have a greater ability to:

- Identify and define the various types of fraud;
- Discuss the COSO framework for internal control, and define its components;
- Use the fraud triangle to detect and deter potential frauds;
- Understand the role that needs to be played by HR to prevent and deter fraudulent financial reporting to secure incentive-based compensation;
- Apply critical analysis of a workplace dilemma.

Synopsis

This case is based on an interview with real-life Amanda Walsh and the internal documents she shared with the authors. Amanda Walsh's first year as Vanderville Plastics Company's (VPC) controller has been quite tumultuous. She has discovered on her first day on the job in early February 2005 that VPC's financial situation is precarious, and has since witnessed a change in ownership, repeated requests for funding to the new owners to help alleviate VPC's severe cash flow issues, and more recently, the Chief Financial Officer's (CFO), Peter Giroux, sudden resignation. Amanda is since acting interim CFO and reporting to Michael Stratton, the Chief Executive Officer (CEO).

A consultant has been hired by the new owners to better understand the causes of VPC's cash flow shortages, and he never seems satisfied with Amanda's answers. Michael does not want the consultant to speak to Amanda directly anymore and to make all of his requests through him. However, she has no choice but to answer one of the owners' questions when he calls her to enquire about a $1 million decrease in accrued liabilities in January 2006. Amanda discovers to her great disbelief that the new owners do not know about the recent payout of bonuses for the 2005 financial year.

Scared and angry, she starts to think about the succession of events since she came to VPC to better understand what this all means.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Pascale Lapointe-Antunes, Brock University, 500 Glenridge Avenue, St. Catharines, Ontario, Canada, plapointe@brocku.ca.

AN INVESTMENT IN FAR AWAY WOODS

Trevor Larkan, Bentley University

Case Objectives and Use

This case can be used at either an undergraduate (corporate finance and/or business management students) or graduate level (MBA or Executive MBA). This case represents some of the challenges and issues faced by companies when pursuing a development project investment within an emerging region. As the case encompasses several different areas of content ranging from corporate strategy, international project finance, project management, financial modelling and projections, ethics and risk evaluation, the case can be used in an applied corporate finance class, or just as a comprehensive business case.

The specific learning objectives are as follows:

- Understand the challenges of managing a business across cultural, language and geographic divides in order to exploit a strategic opportunity.
- Understand ethical dilemmas and other issues confronted by a development project within an emerging region.
- Establish how to source project finance and to then integrate it into the projected financials.
- Calculate the return on investment for, and valuation of, a development project.
- Specifically demonstrate the essential elements for a successful project execution.
- To understand how to structure and formulate a board report.

Synopsis

This disguised case, based on actual events in the time frame of end-2006 through 2007, describes events leading to the formation of a joint venture between a USA industrialist, Terry MacDonald, and a Russian entrepreneur, Oleg Topolev, to exploit a green field investment opportunity in a plywood manufacturing facility in Russia. The planned facility will be relatively large scale by wood product industry standards and the plywood product, for use mainly in buildings, construction and furniture, will be sold both domestically in Russia and exported.

In order to pull the trigger on the first project, Oleg Topolev, now Chairman of the newly formed board, calls a board meeting to evaluate the merits of the recommended first project, a plywood manufacturing facility in Russia. The management team are tasked with putting together a board paper that will allow the board to make an informed decision on this first, important, and significant investment. The paper must outline the strategic opportunity, detail the project management and organization for the construction phase (pre-production startup), prepare detailed project financial projections, together with financing options, show a calculated return on investment, and finally provide a comprehensive risk assessment.

The author developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Trevor Larkan, Bentley University, 175 Forest St., Waltham, MA, 02452, tel. +1-781-891-2219, tlarkan@bentley.edu.

EXPEDIA'S POTENTIAL ACQUISITION OF ORBITZ

Brendan Moore, Northern Arizona University

Case Objectives and Use

The case is appropriate for either MBAs or upper-division undergraduate Finance students. The breadth of subject matter detailed in the case allows the instructor to use the material as a case exam, case report, group project, or a final cumulative assessment. The case dives into the essence of cash flow analysis, sensitivity analysis, and qualitative appreciation of corporate finance decision-making. After thorough case assessment, students will accomplish the following objectives:

1. Determine the quantitative and qualitative benefits and risks of acquisition strategy
2. Assess the costs and risks of large-scale acquisitions
3. Construct a relevant cost of capital
4. Utilize capital budgeting methods in order to appropriately price an acquisition bid
5. Employ sensitivity analysis in the case of varying assumptions

Synopsis

Despite the oligopolistic nature of the online travel industry, competition was aggressive and omnipresent. Ryan Mueller, Vice President of Corporate Strategy for Expedia, Inc., considered ways to contest The Priceline Group, a fierce competitor. After amicable discussions with Orbitz Worldwide, Inc., an opportunity to strategically acquire the U.S. based online travel retailer arose. Orbitz' business model was similar to Expedia's, and Expedia's familiarity with managing large acquisitions implied that Orbitz and Expedia could be integrated with scant internal conflict. Further, revenue and cost synergies would improve Expedia's economies of scale as well as diversify Expedia's revenue segment, thereby increasing Expedia's presence in the airline bookings industry. Mueller was tasked with the duty of pricing an appropriate bid – if Orbitz appeared to be a lucrative investment. Mueller's analysts provided him with expected synergies and Orbitz' cash flow forecasts as well as growth rates. However, the data would allow Mueller to conduct due diligence and model several scenario analyses in the case of uncertainty. Equally important to Mueller's pricing analysis were factors such as oil prices, antitrust risk, and revenue diversification. Mueller would have to consider all dimensions of the potential acquisition deeply. If he were to push for a bid, he needed to justify an acquisition to Expedia's stakeholders.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Brendan Moore, Northern Arizona University, 800 S San Francisco St Flagstaff, AZ 86001, 602-291-0958, brendanwmoore@gmail.com.

DIVESTING IN VETRA

Francisco J. López Lubián, IE Business School

Case Objectives and Use

The case study illustrates the various issues that need to be taken into account during an investment process in a foreign company, and the realistic alternatives to divest a few years later. It also deals with the evaluation of these alternatives in order to take a decision about the investment, analysing key quantitative and qualitative factors.

The case study is aimed mainly at masters and post-graduate students, and fits in perfectly within a course in Advanced Finance or an optional unit on Investments/Divestments. It could also be used in executive education seminars on corporate finance, Corporate Restructuring and company valuations.

Synopsis

In late october 2012, the Board of Directors of Inveravante was expected to hold a meeting in order to analyse the current situation of Vetra, and the possible strategic alternatives of its investment in that company. As Director of Avantegenera, one of the business units of Inveravante, Luis García was appointed to present to the Board of Directors a proposal on some realistic options to the investment in Vetra, and recommendations for the future.

This case describes in detail the investment process in 2007 of a Spanish group (Inveravante) in a small Oil&Gas company, and the eventual divestment in 2012. The case emphasizes the analysis of different alternatives, and their evaluation under qualitative and quantitative criteria.

The author developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case, instructor's manual, and synopsis were anonymously peer reviewed and accepted by the North American Case Research Association (NACRA) for its annual meeting, October 6-8, 2016, Las Vegas, Nevada. Contact person: Francisco J. López Lubián, IE Business School, C/ Maria de Molina, 12, 4th Floor 28006 Madrid. Spain, fco.lubian@ie.edu.

CHINA PAKISTAN ECONOMIC CORRIDOR

Hamda Shahid and Choudhry Tanveer Shehzad
Lahore University of Management Sciences

Case Objectives and Use

The case provides students with an opportunity to:

a) evaluate the effects of FDI on economic growth and balance of payment situation of a country.
b) understand the infrastructure development's role in national and regional economic growth
c) understand major trade linkages and potential of possible synergies in different economies
d) evaluate China Pakistan Economic Corridor's costs and benefits for Pakistan's economy.

Synopsis

This case examines the analysis of the China Pakistan Economic corridor by Saad Afridi, an equity research analyst looking at the prospects of CPEC for potential investors. China Pakistan economic corridor includes a bundle of projects to be implemented in Pakistan with emphasis on the transport and energy sectors. Economic corridors have regional implications as infrastructure development can encourage local industries, investment and employment opportunities. In April 2015, a $46 billion infrastructure spending plan between Pakistan and China was agreed pertaining to these two major sectors. The development of the approximately 2395 km of the China-Pak Economic corridor connecting Kashghar to Gwadar is part of the primary infrastructure development plan of CPEC. The rail sector projects, Gwadar Port Related Projects and the energy sector are also to undergo development with the injection of the Chinese funding. Saad questioned the economic integration, synergies and regional implications for all the stakeholders. He was rather skeptical of the Government guarantees of debt payment and capacity payments to independent power producers, foreign Reserve and FDI Position of Pakistan and overall feasibility of this project for the economy of Pakistan.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Choudhry Tanveer Shehzad, Lahore University of Management Scences, DHA Lahore 54792, Pakistan, 0092-3314401708, tanveer.shehzad@lums.edu.pk.

ACCESS FINANCIAL SERVICES LTD.: CEO MARCUS JAMES FIGHTS TO RETAIN CONTROL OF THE COMPANY

Dr. Valoris Smith and Mrs. Elizabeth Libert
University of Technology, Jamaica

Case Objectives and Use

The case can be used in teaching corporate governance and ethics; and capital structure, and corporate financing decisions. The type of students targeted are graduate, MBA and executive MBA. The issues addressed in this case are:

- Board of Directors role in corporate governance, accountability, independence, and trust;
- Capital structure considerations - capital equity or debt - what is optimal capital mix?
- How corporate financing decisions influence capital structure.

Synopsis

Marcus James, founder and Chief Executive Officer of Access Financial Services Limited (AFS Limited) was in the fight of his life. Subsequent to obtaining Stock Exchange listing in 2009 with the main objective being to obtain external capital for the company; in 2014 three of the company's directors - Christopher Berry and Gary Peart, representatives of Mayberry West Indies and Chairman Brian Goldson - were trying to oust James from his position as CEO. They had charged that Marcus James had acted in breach of his fiduciary duties by spending J$33 million on the refurbishing of the company's offices, owned by Marcus James and his parents, as against the Board's approved amount of J$10 million. Marcus James was in a fierce battle, to retain his position and to prevent a Mayberry West Indies Limited from acquiring shares on the market hence becoming the majority shareholder of AFS limited, hired legal counsel to protect his interest and position. The ultimate offer from AFS Limited main competitor-Proven Investments Limited to acquire Mayberry's shareholding in AFS Limited was the panacea.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Valoris Smith, University of Technology, Jamaica, 237 Old Hope Road, Kingston, Jamaica, 8760382-7594, vsmith@utech.edu.jm.

URSANAV:
THE POWER OF THE BEAR

Susan White and Karen Hallows
University of Maryland

Case Objectives and Use

This case is intended for use at the end of an introductory finance class or in an advanced finance class, for either undergraduate or MBA students. Students will need to know basic capital budgeting techniques to value UrsaNav and its divisions. Students must determine which cash flows are relevant and determine an appropriate return on investment. Some of the issues that need to be addressed include 1. How to handle taxes in a discounted cash flow analysis when valuing an S Corp. incentives which depend on current (known) tax provisions and future (unknown) tax provisions. 2. How to use comparable multiples to develop a cost of capital for a DCF valuation. 3. How to value a firm using comparable transactions. The case could also be used in an entrepreneurship class with more emphasis on how the qualitative benefits of splitting the company into three separate firms. After completing the case, students will be able to: 1. Assess the health of the company, UrsaNav, as well as its three divisions using SWOT analysis and ratio analysis. 2. Discuss the benefits and costs of spinning off or divesting a company. 3. Value the entire company as well as each of the three divisions using discounted cash flow analysis and comparable multiples analysis. 4. Determine how to handle tax incentives when valuing an S Corporation. 5. Perform a sensitivity analysis to determine important variables affecting the firm's value. 6. Make a recommendation about how the future direction UrsaNav should take.

Synopsis

UrsaNav is a U.S.-based, international provider of advanced engineering and information management consulting services in the naval navigation industry. It provides C5ISR (command, control, communications, computer combat systems, intelligence, surveillance and reconnaissance) engineering, marine sensor design, engineering and integration, field engineering, production and installation, and legacy systems integration. The firm is veteran and service-disabled owned, allowing it to have priority over certain contracts and other tax and financial benefits. After about a decade of operating and growing, the firm had become successfully diversified, however it had also grown too large to manage effectively. Thus, the company was spun off into three separate segments: Tagence, Geodesicx and UrsaNav. These segments went "back to the basics," and focused more on serving customers, with each having a more defined company focus. Now, in the fall of 2015, Charles (Chuck) Schue, Chief Executive Officer and Chairman of the Board, was at a crossroads. He was at a point in the growth of the business where he wondered if it had become too large to manage efficiently. Was it time to un-diversify and divest the businesses that he had created?

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Karen Hallows, University of Maryland, 4464 Van Munching Hall, College Park, MD 20852, 571-331-4578, khallows@rhsmith.umd.edu.

CASES WRITTEN IN FRENCH

Chair: Thierry Delecolle, ISC, Paris
Thierry.delecolle@iscparis.com

Co-Chair: Nabyla Daidj, Institut Mines Telecom
Nabyla.daidj@telecom-em.eu

ZITNA PME MAROCAINE:
De l'histoire de la création d'une PME de terroir à la conception de sa stratégie de communication marketing

Abdellatif Ait Heda and Soumiya Mekkoui, ENCG d'AGADIR (Maroc)
Jeanine Billet, Groupe ESC Pau (France)

Case Objectives and Use

- Démontrer l'importance de la cohérence entre les éléments du mix marketing (le produit, le prix, la communication et la distribution.
- Réfléchir sur le rôle déterminant de la communication dans la compétitivité des PME de terroir.
- Permettre à l'étudiant de maîtriser les techniques, les actions, les phases et les composantes de la stratégie de communication marketing.
- Cette approche sur les problématiques liées à la communication marketing, à partir d'un cas réel de PME, montre à l'étudiant combien il est utile et indispensable d'effectuer une analyse pertinente et en profondeur de l'entreprise et de son écosystème, avec ses règles, ses conventions, ses coutumes et ses habitude
- Ce cas sur cette PME de terroir met en exergue la possibilité de développer des « stratégies créatives » pour des PME. Il permet de montrer comment des PME de terroir peuvent s'appuyer sur leur identité propre pour se différencier de leurs concurrents.

Synopsis

Aujourd'hui, ZITNA est une SARL de 80 collaborateurs, constituée essentiellement des femmes des coopératives et les associés de Mr BENDAOUD, dont 3 permanents. Cette entreprise développe une stratégie spécifique, qui s'appuie sur le « Système Productif Localisé », c'est un modèle d'entreprise alternatif qui assure une part de la transformation et de la commercialisation des produits finis[1], huile d'argan, savon noir et d'autres produits cosmétiques. Cette entreprise « citoyenne » a établi un partenariat avec trois coopératives constituées chacune d'une vingtaine de femmes du douar de Oulad Mimoun. Actuellement ZITNA exporte 96% de sa production en Amérique latine. L'engouement récent et grandissant des marocains pour les produits de terroir incite le dirigeant et ses associés à s'intéresser au marché national très porteur. La politique de communication de ZITNA reste le maillon le plus faible de son mix marketing. Aujourd'hui, Mr BENDAOUD est confronté à un problème de taille : son entreprise dispose d'une identité territoriale et entrepreneuriale riches, mais qui n'est pas bien reflétée par sa politique de communication. Il doit faire connaître les spécificités de ses produits et de es pratiques entrepreneuriales, et faire preuve d'une innovation communicationnelle qui lui permette de se doter d'une notoriété et d'une image, en explorant d'autres canaux de communication sur le marché marocain.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note were anonymously peer reviewed at the NACRA 2016 Conference, Las Vegas, Nevada, October 6–8, 2016. Contact Person: Jeanine BILLET, Groupe ESC-Pau, Campus, Universitaire, 3, rue Saint John Perse, CS 17512, 64075 Pau Cedex – France, tel : (33) 5 59 92 64 64, mail : jeanine.billet@esc-pau.fr.

[1] Abdellatif Ait Heda : « Communication d'entreprise et ancrage territorial d'une fabrique de terroir, entre la construction d'une identité et la recherche d'une image : Zitna au sud du Maroc », in Communication publique et territoriale au Maghreb : enjeux d'une valorisation et défis pour les acteurs, l'Harmattan, 2015. Actes du colloque International de Bejaia, 2013.

STRATEGIE MANAGERIALE D'UNE ENTREPRENEURE D'UN ETABLISSEMENT DE SOINS DE SUITE ET DE READAPTATION LA QUIETUDE[2]

Jeanine Billet
Laboratoire IRMAPE - Groupe ESC Pau (France)

Case Objectives and Use

Ce cas d'entreprise, réalisé sur un établissement de Soins de Suite et de Réadaptation du sud-ouest de la France, a été rédigé pour des enseignements en Management Stratégique et/ou en Gestion des Ressources Humaines (GRH), pour des étudiants cycle Master ou MBA ou exécutive MBA. C'est un cas à tiroir qui peut être réalisé en intégralité ou en 2 parties distinctes.La première partie : identification des pratiques stratégiques et managériales nécessaires pour développer et pérenniser cet établissement, pour les 5 ans à venir. La deuxième partie : Gestion des Ressources Humaines, en tant que « partenaire stratégique » de l'entreprise et recherche de la fidélisation du personnel existant et du recrutement de nouveaux collaborateurs compétents, pour les 5 ans à venir**.**

Ce cas permet :
- d'appréhender le rôle d'une entrepreneure dans le secteur de la santé.
- de s'approprier des concepts tels que : la Théorie des Ressources, le Business Model (approche RCOV), la GRH en tant que partenaire stratégique créateur de Valeur.
- d'identifier les spécificités du Management et de Gestion des Ressources Humaines en PME.

Synopsis

En 2000, Maritchu Le Cœur rachète l'établissement de Soins de Suite et de Réadaptation (SSR), La Quiétude (maison de santé médicale créée en 1990) et devient entrepreneure dans le domaine de la santé. Maritchu est présidente de la SAS[3] La Quiétude. Elle développe en permanence, son entreprise en obtenant les certifications nécessaires pour donner de la notoriété à son établissement. La PME La Quiétude est implantée dans le sud-ouest de la France.
Aujourd'hui, Maritchu est confrontée à plusieurs enjeux importants, que ce soit au niveau du Management Stratégique, de la Gestion des Ressources Humaines ou du devenir de son établissement de santé, face à une conjoncture à faible croissance et une législation de plus en plus contraignante.
« ***Comment concilier les logiques propres à l'entreprise en termes de performance, face aux nouvelles attentes des salarié(e)s, pour fidéliser ceux qui sont en entreprise et attirer de nouvelles recrues ? Comment développer un management innovant, en déployant des conditions de « Bien-être » ? »***

Maritchu souhaite continuer à se différencier de la concurrence et rester leader sur son secteur d'activité. Elle cherche en bonne gestionnaire à optimiser les coûts de sa structure et de son personnel, tout en répondant aux attentes de ses patients et aux exigences du secteur de la santé. Elle s'interroge ***: « Quelles sont les décisions à prendre, face aux nouveaux enjeux qui se dessinent ? »***

L'auteure a développé le cas pour une discussion de classe, afin d'illustrer un traitement efficace ou inefficace de la situation. Le cas et sa note pédagogique ont été relus anonymement avant d'être présentés à la conférence NACRA 2016, Las Vegas, NV, le 6-8 octobre 2016. La personne à contacter est : Jeanine BILLET, Groupe ESC-Pau, Campus, Universitaire, 3, rue Saint John Perse, CS 17512, 64075 Pau Cedex – France, tel : (33) 5 59 92 64 64, mail : jeanine.billet@esc-pau.fr.

---

[2] Le nom de l'établissement SSR et celui de l'entrepreneure ont été modifiés en raison d'un souci de confidentialité

[3] SAS : Société par Action Simplifiée

DOMPLUS – PRIORITE A LA PERSONNE:
UN AVANTAGE CONCURRENTIEL EN TERMES DE DIFFERENCIATION ENCORE DURABLE?

Nabyla Daidj, Institut Mines-Telecom. Télécom Ecole de Management
Ronald Kamin, ISC

Case Objectives and Use

L'objectif général du cas est de développer une capacité d'analyse et de synthèse d'une situation complexe de DOMPLUS, PME confrontée notamment à des problématiques de différenciation. DOMPLUS était historiquement un centre d'appels avec des missions d'intermédiation sociale (mise en relation entre différents utilisateurs et organismes) qui a évolué progressivement avec la mise en avant de sa signature « Priorité à la personne ». DOMPLUS poursuit sa croissance dans un contexte de transformation digitale caractérisé par l'entrée imminente de nouveaux acteurs potentiels dont le cœur de métier est justement la collecte, l'exploitation et la commercialisation des données (big data), nouvel or noir de l'économie numérique.

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

Synopsis

DOMPLUS, implantée à Paris et à Grenoble (Eybens), se définissait comme une société d'intermédiation sociale dans le secteur des services. Elle assurait pour le compte d'entreprises et de grands donneurs d'ordre de la protection sociale des prestations de conseil et d'accompagnement à destination de leurs publics (adhérents, clients, salariés). Les thématiques globales pouvaient être liées aux préoccupations de la vie quotidienne : avancement en âge, soutien aux aidants, transition vers la retraite, ruptures familiales, handicap, etc. Depuis sa création, DOMPLUS n'avait cessé de croître.

DOMPLUS avait construit son offre sur la base de la « Priorité à la Personne ». Ainsi, au-delà des aspects stratégiques « traditionnels » qui sous-tendaient le développement de nouveaux services, les éléments éthiques apparaissaient donc comme fondamentaux dans la création de DOMPLUS et dans son développement aussi bien au niveau interne que dans ses relations avec l'extérieur.

DOMPLUS avait fait évoluer son métier de centre d'appels en 2005 à celui d'une SSII de l'information sociale et de l'intermédiation. Le positionnement de DOMPLUS était toujours au centre de la réflexion stratégique dans un contexte où le digital prenait un poids de plus en plus important avec comme conséquences l'arrivée de nouveaux acteurs issus du numérique et de nouveaux enjeux liés notamment aux données massives (*big data*). Comment pérenniser sa signature "Priorité à la personne" dans un tel contexte?

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note were anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, Nevada, October 6–8, 2016. Contact person: Nabyla Daidj, Institut Mines Telecom, Telecom Ecole de Management, 9 rue Charles Fourier, Evry, 91011, France, 33-1-60764141, nabyla.daidj@elecom-em.eu.

KOBOLD FRANCE:
COMMENT REDYAMISER UNE ACTIVITE EN PERTE DE VITESSE[4]

Thierry Delecolle, ISC Paris Business School
Charles Berger, ISC Paris Business School
Christophe Bougereau, Université Bretagne Sud & MCD

Objet du cas et usages

Le cas Kobold a été conçu pour illustrer un cours de marketing et vise à interroger la stratégie clients de l'entreprise.

- Il permet d'illustrer l'intérêt d'un modèle de vente directe et d'interroger les modes de ventes transactionnelle vs. relationnelle.
- Il place l'étudiant dans la position de Pierre-Yves Buisson, directeur commercial de la business unit Kobold, en charge de renouer avec la croissance de cette division.
- D'un point de vue analytique, l'étudiant doit être capable d'identifier les problèmes immédiats, de déterminer les opportunités/menaces du marché et de formuler des choix stratégiques pour assurer la pérennité de la division aspirateur.

La présentation du cas suit une organisation standard depuis le paragraphe d'ouverture, la présentation de la vente directe, du marché des aspirateurs, de l'entreprise (contexte, produits, effectifs, organisation réseau) et la structure commerciale.

Synopsis

Le 22 avril 2011, 2 mois après son arrivée au sein de l'entreprise Vorwerk en qualité de directeur commercial de l'aspirateur Kobold®, Pierre-Yves Buisson doit poser le diagnostic de la situation et proposer un plan d'action pour redynamiser une activité en perte de vitesse. Si l'entreprise est globalement bénéficiaire, portée par la vente des autocuiseurs Thermomix®, la division aspirateurs perd plus ou moins 1 million d'euros depuis une dizaine d'année.

La direction générale, lui donne les moyens de redynamiser cette activité. La maison mère allemande attend des résultats similaires à ses autres marchés (20% des ventes en Allemagne, 30% en Italie). Sur ce marché hyper-concurrentiel avec un prix de vente moyen de 120 € contre 10 fois plus pour Kobold, Pierre-Yves Buisson a pour mission de renouer avec la croissance. Le mode de vente directe est-il le bon ? Quelle stratégie client mettre en œuvre sur le marché français ?

 Contact person: Thierry Delecolle, ISC Paris Business School, 33140539999, Thierry.delecolle@iscparis.com

ACCES BON

Marc L. JAUFFRIT, Groupe ESC-Pau

Les Objectifs du Cas et son Utilisation

Ce cas se propose d'analyser la situation d'une entreprise sous un angle stratégique, puis d'approfondir cette analyse sur les plans financiers, d'analyse des coûts et de construction d'un budget prévisionnel de gestion. Ce cas est donc illustratif des problématiques de décisions stratégiques.

Il est destiné à des étudiants de cycle Master ou MBA ou exécutive MBA.

Le cas est développé autour de quatre axes grâce à un système de cas « à tiroirs ».

L'objectif est d'illustrer l'imbrication étroite des domaines de la stratégie, l'analyse financière, analyse des coûts et construction budgétaire, lors d'une décision stratégique importante.

Ce cas permet aux étudiants de développer leurs compétences en diagnostic stratégique des PME (théorie des ressources et compétences de Roger Penrose, avantage concurrentiel de Michael Porter, notamment). Mais également sur les techniques d'analyse financière en PME (Josée Saint Pierre), la justification du choix de méthode et l'exploitation des résultats de l'analyse des coûts en PME, et de la discussion des hypothèses lors de la construction budgétaire.

Le résumé du Cas

Bien que les problématiques proposées soient assez intemporelles, le cas se situe en 2016. ACCES BON est une entreprise qui fabrique et vend des friandises (bonbons essentiellement) sur le marché français. Elle exporte plus de 5% d'un CAHT de $27,520.10^{6}$€ sur quelques marchés européens. Le marché des friandises croit de 3% par an en moyenne. Cette PME a grandi grâce à de constantes innovations dont certaines lui ont donné un avantage concurrentiel.

Monsieur François CABANNE, le Président Directeur Général, vous présente les activités de l'entreprise. Il nous explique qu'il a mis au point des gélules médicales en chocolat. Innovation pour laquelle il a déposé un brevet.

Il est confronté à une question importante : Une offre d'achat de de ce brevet de gélules médicales lui a été proposée, pour une somme qui lui paraît considérable. Dès lors, doit-il saisir cette opportunité de renflouer les caisses de l'entreprise ou bien exploiter ce brevet et continuer à affronter la concurrence sur le secteur.

Au fur et à mesure il vous ouvre un peu plus les comptes de l'entreprise.

La note pédagogique permet de retrouver les calculs effectués par M. CABANNE. Elle livre ses réflexions sur l'état de son entreprise et sur la réponse qu'il compte faire à son acheteur potentiel.

L'auteur a développé le cas pour une discussion de classe, afin d'illustrer un traitement efficace ou inefficace de la situation. Le cas et sa note pédagogique ont été relus anonymement avant d'être présenté à la conférence NACRA 2016, Las Vegas, NV, le 6-8 octobre 2016. La personne à contacter est: Marc L. JAUFFRIT, Groupe ESC-Pau, Campus Universitaire, 3, rue Saint John Perse, CS 17512, 64075 Pau Cedex – France, (33) 5 59 92 64 64, marc.jauffrit@esc-pau.fr.

KAVIARI: LE CAVIAR A L'ETAT PUR

Ronald G. Kamin
Sabine Ruaud, Edhec

Case Objectives and Use

Ce cas répond à trois objectifs. Il s'agit tout d'abord de présenter le marché du caviar en France. La multitude des acteurs qui le composent, l'enchevêtrement des circuits de distribution menant au consommateur, la sophistication du produit lui-même en font un marché complexe, d'autant plus difficile à cerner que certains facteurs clefs de réussite sont spécifiques aux différents sous-ensembles qui le forment. L'étudiant doit donc définir dans un premier temps le marché sur lequel évolue la société Kaviari pour ensuite identifier et comprendre la problématique à laquelle est confrontée la Direction générale. Le deuxième objectif vise une étude approfondie de la position concurrentielle de Kaviari en prenant appui sur l'analyse des données quantitatives, connues ou extrapolées, du cas. Les réflexions menées autour de celles-ci permettent à l'étudiant de conceptualiser la démarche de segmentation, de ciblage et de positionnement préalable à l'examen et à la discussion des stratégies marketing possibles. Le dernier objectif, enfin, est d'aboutir à une prise de décision. L'étudiant doit désormais être en mesure de répondre à la problématique de la société Kaviari, notamment grâce à l'exposé des facteurs clés de succès spécifiques aux segments de marché en relation avec les avantages concurrentiels du négociant-affineur. Ce cas est construit et rédigé pour faire l'objet d'une discussion de groupe. Il est destiné à un public d'étudiants (Universités et Ecoles de commerce) dotés des prérequis marketing au niveau licence.

Synopsis

Servi autrefois à la cour de Russie lors des grands banquets impériaux, le caviar provenant d'esturgeons sauvages a longtemps été l'attribut incontournable d'une gastronomie de luxe réservée à une élite fastueuse. Cependant, depuis l'interdiction de la pêche sauvage en 2006 en mer Caspienne, près de 90% du caviar consommé dans le monde est désormais issu de fermes d'élevage. En raison de la diversité des caviars issus de différentes espèces d'esturgeons, l'offre d'élevage, référencée par les grandes maisons spécialisées de l'épicerie fine et de la restauration de luxe, ainsi que par les marques alimentaires des grandes surfaces, est au cœur d'une bataille de perception consommateur. D'un côté, il y a le producteur, gardien du secret de l'élevage de l'esturgeon et de la production de caviar et de l'autre, le négociant-affineur, détenteur de l'expérience de la sélection des caviars à l'échelle mondiale. C'est dire si le marketing a un rôle important à jouer dans le positionnement et les décisions d'achat de ce produit emblématique.

A la veille des fêtes, temps fort de la saison 2015-2016, Karin Nebot, 43 ans, Directrice Générale et associée de la société Kaviari, un négociant-affineur implanté au cœur de Paris, s'interroge sur la légitimité de son *business model* : *« Le caviar se situe aujourd'hui à un nouveau tournant. De plus en plus de quantités sont produites et de plus en plus d'éleveurs veulent devenir marchands de caviar. »* Karin précise : « *Les relations commerciales se déroulant entre professionnels ou consommateurs présentent des différences non négligeables, et parfois même complémentaires. Le négociant a une longueur d'avance, mais pour combien de temps encore?»* Les questions sur l'avenir du modèle négociant ne manquent pas pour Karin Nebot. Deux types de stratégies se dessinent à court terme dans un contexte concurrentiel menaçant: l'une, d'élargissement de la clientèle de luxe, l'autre, d'ouverture au grand public. En d'autres termes, que doit faire Kaviari pour préserver son avantage concurrentiel et quelle est désormais la place du négociant dans un marché devenu mondial et en pleine mutation?

The author developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Ronald G. Kamin, 33610359179, ronaldkamin@hotmail.fr.

« LES MADELEINES DE LIVERDUN » :
COMMENT DEVELOPPER LA MARQUE TOUT EN GARDANT SES VALEURS PATRIMONIALES ? »

Christine Kratz, ICN Business School (France)

Objectifs du Cas et Utilisation

Ce cas est parfaitement approprié dans un cours de marketing général, ou peut être utilisé sur des thématiques plus spécifiques de marketing stratégique, de management de l'offre commerciale (produit/prix), de gestion de la marque.
Elle s'adresse à un public d'étudiants de formation initiale ou de formation continue, en école de management ou en université.

Les objectifs pédagogiques visent à développer tant l'esprit d'analyse que la créativité des apprenants. Il s'agit de:
- Maîtriser le diagnostic marketing ;
- Analyser une stratégie marketing (segmentation, ciblage et positionnement) et ses incidences sur le marketing opérationnel ;
- Formuler des recommandations tactiques en termes de management de l'offre commerciale : gestion des gammes produits, conception de packaging, politique de prix ;
- Etre créatif (*ve*) dans les recommandations (nouveaux produits, identité visuelle, …)
- Comprendre la problématique de la gestion d'une marque, et notamment du choix stratégique en termes d'extension de marque *vs*. extension de gamme ;

Cet outil pédagogique peut être utilisé en tant que cas de synthèse ou de fil conducteur à un cours de marketing (réparti sur plusieurs séances). Il est conçu pour être travaillé et animé en groupes.

Synopsis

L'entreprise « Les Madeleines de Liverdun » représente un monument du patrimoine culinaire lorrain. Depuis plus d'un siècle, elle fabrique des madeleines, de manière artisanale. En février 2015, l'entreprise est rachetée par Vincent Ferry, PDG de Clair de Lorraine, spécialisée dans la fabrication et distribution de produits régionaux. Le dirigeant est conscient des enjeux actuels : la marque est confrontée à une forte concurrence régionale et nationale, mais en parallèle, elle a aussi des perspectives apportées par les évolutions favorables du secteur de la pâtisserie traditionnelle et des nouvelles tendances de consommation.

C'est dans ce contexte que le repreneur réfléchit à de nouvelles opportunités de croissance, tout en ayant la volonté de s'appuyer sur les acquis de la marque. En particulier, le PDG étudie différentes alternatives de développement de l'offre, à savoir : une extension de gamme et/ou une extension de marque.

A cette fin, les apprenants doivent remettre aux dirigeants:

- un diagnostic marketing de l'entreprise au regard des tendances de l'environnement (macro environnement, concurrences directe et indirecte, attentes du consommateur) ;
- une recommandation sur les orientations stratégiques à adopter ;
- un plan d'actions marketing en accord avec ces orientations ; les options (extension de marque et/ou de gamme) seront plus spécifiquement étudiées.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Christine Kratz, ICN Business School (France), 0033 6 18 38 98 98, christine.kratz@gmail.com.

COMPTOIR DES COTONNIERS ET LE DÉFI OMNI-CANAL

Comment la marque Comptoir des Cotonniers peut-elle ré-enchanter le parcours client et l'expérience en boutique?

Céline Del Bucchia, Audencia Business School
Marie-Catherine Mars, Edhec Business School

Objectifs du cas et Intégration dans une sequence pédagogique

Ce cas s'inscrit dans un cours sur les stratégies de distribution (niveau bachelor) ou dans un module sur la distribution omnicanale et le parcours client (niveau master). Il illustre plus spécifiquement une démarche de transformation omnicanale d'une enseigne, pour toile de fond, le lancement d'un nouveau concept de magasin expérientiel et connecté, sur le marché français. Le cas peut s'intégrer comme cas « fil rouge » lors d'un module sur les stratégies de distribution, ou bien sur l'expérience client / comportement du consommateur.

Les objectifs pédagogiques du cas sont les suivants : Analyser l'Identité et le Positionnement d'une marque sur son marché; Évaluer les transformations du parcours client, à travers une étude qualitative sur l'expérience client dans l'univers de la mode (interviews, netnographie, observations; Comprendre les évolutions des politiques de distribution dans un contexte omni-canal et expérientiel.; Développer des recommandations managériales sur la façon à proposer de nouveaux services et un nouveau concept en magasin.

Synopsis

En ce jeudi 18 février 2016, Joséphine Di Rosa retourne à son bureau après son point hebdomadaire avec sa manager, Valérie Dassier, la directrice e-commerce, CRM et service client des marques Comptoir des Cotonniers et Princesse Tam-Tam chez Fast Retailing. Lors de cette réunion, Valérie Dassier qui rentre tout juste de la dernière conférence de la NRF aux Etats-Unis, a débriefé avec enthousiasme ses équipes sur les dernières innovations qu'elle avait repérées à la grande messe américaine du Retail et du E-Commerce. Pour Valérie, il n'y a aucun doute, le shopping connecté va bouleverser le marché de la mode: le mobile et le crosscanal sont l'avenir du retail mode.

Ce jeudi, à la fin de la réunion, Valérie retient Joséphine, qui vient d'être recrutée comme assistante de marque chez Comptoir des Cotonniers, pour lui exposer le premier dossier d'envergure sur lequel elle lui demande de l'aider. Dans le contexte actuel de shopping connecté, après son opération Fast- Shopping, Comptoir des Cotonniers veut réinventer l'expérience de shopping mode pour surprendre ses clientes, sur les multiples points de contact avec la marque et ainsi répondre à leurs attentes digitalisées.

Valérie demande à Joséphine de réfléchir à une nouvelle expérience client, permettant à Comptoir des Cotonniers de se différencier durablement sur le marché de la mode féminine. Parmi les pistes de réflexion, Joséphine doit s'interroger sur le rôle du magasin dans le futur.

En sortant du bureau de Valérie, Joséphine se dit que pour répondre à ces questions, elle doit étudier l'identité de la marque Comptoir des Cotonniers et son positionnement sur le segment du luxe abordable en mode féminine. L'analyse des tendances de consommation omni-canal, des concepts innovants en distribution, de la voix du client, lui semble être un bon point de départ pour nourrir ses recommandations. Mais plus important, Joséphine réalise qu'elle devra s'immerger dans le parcours client digitalisé des clientes de la marque. Analyser l'expérience client lui permettra d'imaginer de nouveaux services et de ré-enchanter l'expérience en boutique, afin créer durablement de la valeur pour la consommatrice et pour la marque. Résolue à relever le défi qui vient de lui être proposé, Joséphine s'assoie à son bureau, rallume son ordinateur et commence à travailler immédiatement.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Céline Del Bucchia, Audencia Business School, 38 rue de la Jonelière 44312 Nantes, France, +33 2 403 745, cdelbucchia@audencia.com

PRET-A-PORTER MASCULIN: WUEL(S) RELAIS DE CROISSANCE POUR LA GENTLE FACTORY ET LE GROUPE HAPPYCHIC SUR LE CRENEAU DE L'ECO-CONCEPTION?

Sabine Ruaud, Edhec Business School, Lille France
Véronique Boulocher, Brighton Business School, UK
Ronald Kamin

Case Objectives and Use

Ce cas pose la problématique de développement d'une marque sur son marché. Les apprenants développeront des compétences en matière d'analyse de marché et de recommandations marketing de développement de marque. Ils développeront également une bonne connaissance du marché français du prêt-à-porter, et des problématiques posées par l'éco-conception textile ainsi que des enjeux du développement durable dans l'industrie textile. Le cas permet aux étudiants de:

- Appréhender la démarche d'analyse d'un marché grâce à l'outil de synthèse qu'est le SWOT
- Considérer les options possibles de stratégies de croissance pour une marque via la matrice Ansoff
- Faire des recommandations stratégiques pour une marque
  Développer un plan marketing

Synopsis

«Consommer mieux est un enjeu de société majeur et un atout de différenciation important. Aussi, j'avais à cœur de construire un nouvel imaginaire qui inspire et entraîne nos clients vers des pratiques plus durables et responsables. J'ai donc conçu pour l'homme une mode qui change le monde… une mode qui a le sens de la séduction autant que le sens des responsabilités; bref, une mode qui se conjugue au présent mais qui s'accorde au futur ». Christèle Merter se souvient comment elle avait convaincu son employeur, le fabricant de mode HappyChic, de se lancer en avril 2014 dans la mode éco-responsable avec une nouvelle marque, La Gentle Factory, dont l'entreprise lui confia la direction.
La Gentle Factory est positionnée développement durable. Son objectif:

- proposer avant tout des vêtements modernes et désirables,
- développer lesdits produits selon une démarche citoyenne et responsable, contrôlée avec soin à chaque étape de leur réalisation,
- innover avec une plateforme collaborative gratuite de services qui permet aux vêtements d'avoir une seconde vie « utile ».

En ce matin d'avril 2016, La Gentle Factory est à un tournant stratégique de son développement et Christèle s'interroge sur la stratégie à adopter pour que « sa » start-up réponde aux ambitions du groupe HappyChic: devenir la marque référente de la mode responsable pour l'homme et être créatrice de valeur pour le groupe et ses marques. D'ici la fin de l'année, La Gentle Factory doit réaliser un chiffre d'affaires de +65% pour atteindre les 5 millions d'euros et, à horizon 2020, avoisiner les 30 millions soit près de la moitié du chiffre d'affaires d'HappyChic. Christèle hésite entre plusieurs stratégies possibles:

- faut-il privilégier un développement de la marque La Gentle Factory par le marché en ciblant de nouveaux canaux de distribution ? Lesquels viser ?
- faut-il plutôt privilégier un développement par les produits en valorisant l'offre ?
- ou faut-il envisager un développement de la marque via les deux stratégies simultanément alors qu'elle dispose d'un budget marketing de seulement 60 000 euros ?

Début mai 2016 Christèle doit présenter le plan marketing de la marque pour les deux années à venir. Il est urgent pour elle de mettre son équipe à pied d'œuvre.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Sabine Ruaud, EDHEC Business School, 24 Avenue Gustave Delory,CS 50411, Roubaix, France, 33 (0)3 20 25 45 39, sabine ruaud@edhec.edu.

CASES WRITTEN IN SPANISH

Chair: Josep Cano, ESADE
Joseplluis.cano@escade.edu

TIGOUNE:
LA CENTRALIDAD DEL CLIENTE EN UNA INTEGRACIÓN CULTURAL

Ernesto Barrera Duque and Natalia Arbeláez López

Case Objectives and Use

Objetivos de enseñanza:

- Comprender el proceso de construcción de la cultura organizacional a partir del comportamiento y decisiones del alto directivo
- Analizar las palancas críticas de un alto directivo para liderar un cambio organizacional
- Implementar un plan de acción para incorporar la orientación al cliente en el ADN de la empresa

Problemas del caso:

- ¿Cómo se debe configurar el estilo de liderazgo de un líder del cambio para integrar dos culturas aparentemente opuestas?
- ¿Cómo integrar y alinear a un equipo de alta dirección que recién comienza a trabajar junto?
- ¿Cuáles son los retos personales del alto directivo en medio de la incertidumbre que genera un proceso de integración cultural?
- ¿Cómo incorporar la orientación al cliente en la cultura de la organización?

Synopsis

Para julio de 2015, Esteban Iriarte había vivido durante los últimos doce años en nueve ciudades y en cinco países diferentes. Con amplia experiencia en el sector de las telecomunicaciones fijas llegó en 2012 a dirigir Tigo Colombia, el tercer operador del mercado móvil. Iriarte no conocía del sector móvil, pero tenía claro que debía complementar su perfil profesional para continuar haciendo carrera en el mercado de las telecomunicaciones. Al llegar a Colombia enfrentó varios retos. La matriz, *Millicom* global, no confiaba en la estrategia y estructura actuales ya que los resultados no eran los esperados. Al poco tiempo de llegar a Colombia, junto con el equipo global de *Millicom*, se trazaron el objetivo convertir a TIGO en el segundo operador del mercado móvil y comenzaron las negociaciones para la integración de Tigo y UNE.

La fusión de estas compañías suponía un gran desafío. El proyecto tenía muchos opositores (sindicatos, medios, políticos, competidores, etc.). La fusión era muy importante para *Millicom*: Colombia representaba una gran oportunidad de crecimiento. Con la integración la operación en el país se convertiría en una de las de mayor valor para *Millicom*.

UNE era el socio ideal para TIGO. Los accionistas de ambas compañías se conocían y sus negocios se complementaban. Después de un largo proceso de negociación se llegó a un acuerdo sobre la fusión de estas empresas. Esteban siendo un hombre pragmático comenzó a planear la integración antes de que esta se diera con el fin de tener un "mapa trazado y no dejar nada al azar", según sus propias palabras.

Uno de los mayores desafíos era profundizar la integración cultural y marcar la orientación al cliente en el ADN de la organización. Los antecedentes de ambas compañías eran muy distintos; así como el estilo de dirección y los perfiles de las personas. El proyecto de fusión cubría a TIGO y a UNE incluyendo sus seis filiales. El impacto de esta integración tendría efectos en más de 30 mil empleados y sus familias.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Ernesto Barrera Duque, INALDE Business School, Autopista Norte, KM. 7, Costado Occidental INALDE Chía, Bogotá, Cundinamarca 12345, Colombia. ernesto.barrera@inalde.edu.co

CASO BYHOURS

Josep Lluís Cano Giner and Josep Mª Sayeras
ESADE Business School (Ramon Llull University)

Case Objectives and Use

Los objetivos del caso son:

- Analizar la situación de una organización a partir de sus datos.
- Formular posibles estrategias, basándose en su capacidad de análisis.

El caso ByHours ha sido diseñado para ser utilizado en cursos sobre sistemas de información.

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

El caso ha sido diseñado para ser utilizado de dos maneras:

A. Entrega de la base de datos en Excel, los alumnos deben proponer cómo analizar dichos datos y analizarlos.
B. Entrega de anexo con los datos preparados en tablas y gráficos para que los alumnos participantes extraigan sus conclusiones del diagnóstico, sin necesidad de manipular los datos. Con el caso entrega un anexo independiente para poder realizar dicha función.

Synopsis

En marzo del 2012, Christian Rodríguez, Christian Picard y Guillermo Gaspart fundaron la startup Byhours en Barcelona con una nueva idea: "vender estancias diurnas en hoteles para vivir unas horas fuera de lo normal". Esa idea se tangibilizó después con las "microestancias"; es decir, estancias de 3,6 o 12 horas.
A principios de febrero del 2015 tiene que tomarse una decisión vital para el futuro de la empresa: qué hacer (a tenor de los datos de que disponían) y, dependiendo de la respuesta, cómo afrontar la próxima ronda de financiación que ocurriría en breve.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Josep Lluís Cano, ESADE Business School (Ramon Llull Unicersity), Av. Pedralbes 60-62, 08034 Barcelona, Spain, +34-93-280-6162, joseplluis.cano@esade.edu.

UNA PROPUESTA DE INVERSIÓN POCO CONVENCIONAL

Gabriel Noussan, IAE Business School

Case Objectives and Use

El caso propone el análisis de 4 alternativas de inversión muy diferentes en el negocio de bienes raíces.
Patricio Anibal Gonzalez Echague, un rico empresario retirado, gestiona y disfruta de hacerlo en forma personal, sus inversiones en Real Estate, activos representan un 30% del total de su riqueza. En abril de 2016 tiene que decidir hacia cual de esas 4 alternativas dirigirá los fondos que ha recuperado de una reciente y muy exitosa inversión, son U$S 4 Millones que representan un 20% del total de su patrimonio.

Los objetivos de aprendizaje son: 1) Hacer una introducción a la problemática de la inversión en negocios de bienes raices 2) Reflexionar sobre las características, ventajas y desventajas de 4 diferentes formas de realizar inversiones en el sector de bienes raíces.

Este caso ha sido preparado especialmente para ser incorporado en la parte inicial de una materia electiva a ser ofrecida en los programas MBA, sobre real estate o sobre Finanzas Personales. Permite una introducción sencilla e interesada de los participantes en los elementos básicos de las operaciones Inmobiliarias como vehículo de inversión. La información que provee el caso permite un abordaje conceptual introductorio a 4 modalidades de ingreso al negocio de Real Estate desde el punto de vista de un Inversor, aunque no brinda mucha información cuantitativa que posibilite un abordaje excesivamente númerico que lo haría demasiado técnico para el público y el nivel de conocimientos para el que se está planteando. Por lo tanto para el tratamiento de este caso no se requiere un amplio conocimiento previo ni de herramientas de finanzas ni de Real Estate, por parte de los estudiantes.

Synopsis

El caso describe la situación de Patricio Aníbal González Echague un Consultor en temas de tecnología, empresario retirado, que está analizando en Abril de 2016 como invertir aproximadamente U$S4 Millones en bienes raíces luego de haber salido de una muy exitosa inversión en la zona de Brickell en Miami. Los U$S 4 Millones representaban el 20% de su patrimonio de inversiones. El caso propone el análisis de 4 alternativas de inversión muy diferentes 1) una inversión en pre-construcción en Miami o en Buenos Aires 2) una inversión mediante Crowdfunding, 3) una inversión en REIT's y 4) una inversión poco convencional para el sector que le presento la empresa INMSA. Sus conversaciones con Mario Vizcaya un joven analista Financiero especialista en mercados financieros, lo ayudaron siempre a dirigir con mucha pericia sus inversiones puramente financieras que representaban el 70% de su Patrimonio. Sin embargo como resultado de una reunión que tuvo con Directivos de la empresa INMSA Real Estate Investment Company Patricio estaba por un lado, algo desconcertado por la forma categórica con que habían rechazado sus ideas de inversión, pero también interesado en la innovadora propuesta que le formularon.

The author developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case, instructor's manual, and synopsis were anonymously peer reviewed and accepted by the North American Case Research Association (NACRA) for its annual meeting, October 6-8, 2016, Las Vegas, Nevada. Contact person: Gabriel Noussan, IAE Business School, Universidad Austral, Mariano Acosta s/nº y Ruta Nac. 8 (1629) Pilar - Buenos Aires, Argentina, 54 2304 481 032, gnoussan@iae.edu.ar.

*LAVINYETA (A)

Josep M. Sayeras
Pedro Aznar
Guillem Gordó Bach
ESADE – Universitat Ramon Llull

Case Objectives and Use

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

- Discutir la definición de “mercado” desde el punto de vista de *Managerial Economics*.
- Señalar los distintos actores que van a jugar un papel determinante en el proceso.
- Buscar las ventajas competitivas, sus fuentes, así como su posibilidad de permanencia en el tiempo.
- Analizar la toma de decisiones no estructuradas sobre la base del análisis estratégico con múltiples variables.
- Analizar la decisión de elección de un distribuidor por parte de los emprendedores, la estrategia inicial de la empresa y su impacto en el sector.
- Presentar la evolución de la industria (distinción entre el corto plazo y largo plazo) de una estructura de competencia monopolística.

l caso *lavinyeta ha sido diseñado para ser utilizado en cursos de *Managerial Economics*; de Política de Empresa/ Estrategia y Entrepreneurship. Puede ser usado con alumnos de MBA que tienen distintos perfiles y años de experiencia (tiempo completo, tiempo parcial o en formatos *Executive MBA*) y en programas ejecutivos, tanto abiertos como en formatos *In-Company Training* (ICT). Igualmente, puede ser utilizado con los alumnos de grado, siempre que se encuentren en los últimos años de su formación. Es decir, se puede utilizar tanto en cursos básicos como avanzados, siempre que se adapte su enfoque. En los cursos básicos, se puede utilizar como introducción a la delimitación del mercado; mientras que, en cursos avanzados, el principal foco debe la evolución del sector y de la industria y la “posible” interacción estratégica en la toma de decisiones.

Synopsis

El caso se situa en marzo del 2005, cuando Josep Serra y Marta Roca deben decidir si implementan o no su sueño (creación de una bodega). Destacar que a pesar de poderse tratar de manera independiente, forma parte de un grupo de 5 casos donde se tratan las vicisitudes de esta pareja de emprendedores en sus momentos clave. Aparecen elementos relacionados con la tipología de mercado, las ventajas competitivas de la empresa, aspectos del modelo de las cinco fuerzas de Porter; con el objetivo de poder establecer si es oportuno y conveniente escoger un determinado distribuidor. Se facilitan datos sobre la demanda y la oferta del sector, tanto a nivel local, como nacional e internacional.

Mensajes clave a destacar durante la sesión
No se puede tomar decisiones desde una única perspectiva.
No se cuenta siempre con toda la información.
Los análisis deben ser sistémicos.

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 was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8. Contact person: Josep M. Sayeras, ESADE-URL. Avinguda Pedralbes 60, 08034 Barcelona, Spain, +34-934.952.091, josepm.sayeras@esade.edu.

UN PLAN DE DESARROLLO ECONÓMICO PARA EL ESTADO DE CHIHUAHUA

Areli Chacón Silva, University of Texas at El Paso

Objetivos y Usos del Caso

El caso puede ser usado en programas de maestría o posgrado, en especial en el MBA o MPA (políticas públicas) en los cursos de economía, macroeconomía, competitividad y geoeconomía. Los objetivos son:

- Determinar las restricciones que frenan el desarrollo exportador de una región.
- Evaluar el rol de la industria maquiladora de exportación en una región fronteriza con los Estados Unidos de Norteamérica.
- Buscar nuevas ventajas competitivas en una región geográfica.
- Proponer acciones de políticas públicas que impacten el desarrollo económico de una región.

Synopsis

Manuel Russek Valles reconocido empresario chihuahuense, fue invitado a trabajar en el gobierno del Estado de Chihuahua en Octubre de 2010, al frente de la Secretaría o Ministerio de Economía. La primera y más importante reunión la tuvo ese lunes con los presidentes de las agrupaciones empresariales, industriales, ganaderas y comerciales de todo el Estado de Chihuahua, su equipo de colaboradores cercanos y algunos asesores económicos. Manuel Russek necesitaba diseñar un Plan de Desarrollo Económico para el Estado de Chihuahua, el cual tuviera las políticas públicas que garantizaran la generación de riqueza y el incremento en el nivel de vida de la población de esa región.

Russek Valles sabía que no sería una tarea fácil, pues Chihuahua había registrado bajos índices de crecimiento debido a la recesión económica mundial y principalmente a la crisis de los Estados Unidos de Norteamérica, país con el que Chihuahua sostenía una relación comercial muy fuerte. A los estudiantes se les pide que realicen una evaluación sobre las condiciones económicas y la situación que enfrenta Chihuahua y que emitan recomendaciones dentro del contexto de las políticas públicas que deben ser adoptadas para los siguientes seis años de gobierno.

The author developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact Person: Areli Chacón Silva, Ph.D. University of Texas at El Paso, 500 W. University Ave. El Paso, TX 79968, +1(915)747.6275, achaconsilva@utep.edu.

CORPORATE GOVERNANCE AND ETHICS

Chair: Marlene Reed, Baylor University
Marlene_reed@baylor.edu

Co-Chair: Chandra Hodgson, Humber College
Chandra.hodgson@humber.ca

THE GOVERNANCE OF KARACHI STOCK EXCHANGE: A CASE OF EXPLODING MANGOES

Faraz Ahmed
Dr. Mohsin Bashir
Mr. Khalid Mirza
Lahore University of Management Sciences

Case Objectives and Use

The case can be used as a part of the MBA or EMBA course on “Corporate Governance”. The objectives are:

1) Understand the workings of the stock markets and the formation of their Boards in Pakistan.
2) Recognize and examine different governance-related problems an organization may face.
3) Discuss some of the methods to improve the process of governance in an organization.
4) Understand the history, concept and significance of the financial instrument, badla financing, which sparked the conflict between the Chairman of the Board and the elected Board of Directors of the KSE.
5) Examine the actions that a top-tier level executive can take to solve a managerial conflict.

Synopsis

This case is based on actual events that took place in Karachi Stock Exchange (KSE) in 2010. The case describes a sensitive situation facing Mr. Zubyr Soomro, the then Chairman of the Board of Directors of KSE, in the wake of conflict that was caused between him and the elected Board of Directors (i.e. the brokers). The grievances between both the parties had been gaining momentum owing to several problems that had crept within the governance, and the structure of the Board of KSE. However, the final grievance that motivated the elected directors to take an action against the Chairman was the disagreement over the implementation of a financial instrument, *badla financing,* between both the parties.

Soomro, owing to the hefty risk inherent within this instrument, wanted to abolish badla financing whereas the elected directors voiced their support in continuation of badla financing. The elected directors noticed that Soomro had radically gone beyond his authority to intervene in a matter such as this, which should have best been left in the hands of the Managing Director of KSE. As the pressure to resign from the community of brokers grew, Soomro wondered whether what he did was justified and in a circumstance such as that, what was the best course of action that was available to him.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Faraz Ahmed, Lahore University of Management Sciences, Sector U DHA, Lahore, + 92 333 7544330. faraz.s.ahmad@gmail.com.

GOVERNING WITH SHACKLES:
CHALLENGES FOR THE BOARD TO SELECT PESCO CEO

Naeem Ashraf, Lahore University of Management Sciences
Anwar Khurshid, Lahore University of Management Sciences

Case Objective and Use

This case can be used in second year MBA or EMBA course of corporate governance. Ideal locating for teaching would be towards the latter half of the course where students can leverage from their understanding of corporate governance issues and challenges. This case can also be taught in executive courses on corporate governance. The objectives are:

1. To appreciate the fiduciary responsibility of the board to monitor, oversee and control the management.
2. To emphasize that board cannot delegate governance functions to management.
3. To highlight the role, responsibilities, and jurisdiction of the board.
4.
5.

Synopsis

In December 2014, Malik Muhammad Asad - Chairman of the Board of Directors of Peshawar Electricity Distribution Company (PESCO), together with the board of directors, had to finalize and recommend candidates for the post of PESCO's CEO, when former CEO – Brig.(Retired) Tariq Sadozai was asked by the Ministry of Water and Power to head National Electric Power Regulatory Authority, the Board started the recruitment process as per the legal procedure. One hundred and nine candidates applied for the post, out of which ten candidates were shortlisted. The Board had to recommend names of three candidates to the Ministry of Water and Power. Asad knew that it would be a very difficult decision for the Board to find the best match. Given the precarious situation of PESCO due to exorbitant line losses, customers' protests because of frequent outages, and undue interference from the public officials, he was wondering whether the board would favor internal candidate - PESCO's senior management who applied for the post of CEO, or external candidate who was not currently employed by PESCO. He knew that the board had to finalize, and recommend the candidate before the Ministry takes the initiatives and appoint a non-deserving candidate.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Naeem Ashraf, Lahore University of Management Sciences, Opposite Sector U, DHA, Lahore, Pakistan, +92-42-35608433, naeem.ashraf@lums.edu.pk.

THE FLINT WATER CRISIS

Nancy M. Levenburg and Marie McKendall
Grand Valley State University

Case Objectives and Use

The case is designed to be used in a course in which upper-level undergraduate or graduate-level students focus on management, organizational behavior, and/or ethics. It may also be useful in a public administration course, such as Politics and Health Policy or Urban Environmental Planning.

The case design is structured so that students gain a general overview of the events leading up to the Flint (Michigan) water crisis, including the perspectives of Flint residents, city and state officials, and water resources experts. This enables students to assess the issue from a variety of stakeholders' perspectives. Then, based on the information provided about the issue, students assess the multiple factors that led to a catastrophic outcome.

Specific case objectives include:

1. Disentangle and evaluate sources of failure and accountability in a complex organization/situation.
2. Analyze how organizational culture and structure can foster flawed and/or immoral decisions.
3. Become familiar with behavioral ethics and analyze the contributory role of self-deceptive techniques/practices in decision making.
4. Investigate environmental racism and determine whether it played a role in the Flint crisis.
5. Evaluate a for-profit company's response to a community crisis in view of its corporate social responsibility stance.

6.
7.

Synopsis

In 2011, immediately after state officials decided to begin sourcing the tap water of Flint, Michigan, from the Flint River, residents began complaining about the cost, color, and quality of their water. General Motors stopped using Flint River water at its Flint engine plant because high chloride levels were causing parts to rust. Amidst public pressure from a Michigan State University pediatrician who found elevated lead levels in children coinciding with a switch to Flint River water and a Department of Health and Human Services' report indicating an increase in the number of cases of Legionnaires' disease – a severe form of pneumonia, Michigan's Governor (Rick Snyder) eventually declared a state of emergency and activated the Michigan National Guard to patrol the city and assist the American Red Cross with the distribution of bottled water and water filters. By that time, citizens of Flint had been exposed to poisoned water for nineteen months.

What went wrong? What dysfunctions and conditions in state organizations led to flawed decision making and catastrophic outcomes? The case provides a general overview of the city of Flint, events leading up to the Flint water crisis, information about the involved state organizations, and a chronology of the tap water sourcing decision. This timely case prompts readers to analyze the actions that led to the poisoning of Flint's water supply.

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 anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Nancy Levenburg, 3109 L. William Seidman Center, 50 Front Avenue SW, Grand Valley State University, Grand Rapids, MI, 49504, 616-331-7475, levenbun@gvsu.edu.

THE $30M DILEMMA:
A NEW AUDITOR FOR THE COLLEGE

Marlo Murphy-Braynen, Doctoral Student, University of South Florida
Abdoulie Jammeh, Doctoral Student, University of South Florida
Under the supervision of Bentley University Professor Janis L. Gogan

Case Objectives and Use

The case, targeted for a graduate course in corporate governance and ethics or accounting and finance, supports discussion of the importance of an audit. The objectives are:

- Recognize challenges in institution-building in developing countries, specifically in the context of higher education.
- Explore financing challenges in resource-constrained developing countries.
- Recognize the signaling and trust-engendering implications of a well-executed audit and the broader corporate governance practices and capabilities.

Synopsis

This case, based on actual events that took place at a public college in a developing country, describes the difficult situation facing CFO Matthew A. Ronald (fictional) at The College of The Bahamas. Ronald rose early on Saturday morning, May 24, 2013 and headed into the office. Ronald was acutely aware of the many projects and challenges that the outgoing office holder had left for him to tackle. For starters, an online payment solution was urgently needed to deal with the long line of customers that queued up daily at the Business Office. He also had just three weeks to prepare College annual budget; under optimal conditions this would take at least three months. He also faced pressing deadlines to address financial union matters, critical cash flow shortages and a back log of audits. As he reviewed the workload on his desk, a communication from the College's Board caught his eye. Ronald was very surprised to learn that the board had appointed new auditors. Based on Ronald's public accounting experience, the selected firm lacked the experience and technical skills needed to conduct appropriate oversight of a $150 million institution of the size and complexity of The College of The Bahamas.

Moreover, Ronald was surprised that the College's Board did not seek any input from him in the course of appointing the auditors. Ronald knew that the appointment was critical because the College was in the process of securing a $30M loan to facilitate its transition to a university. The lending institution had specified that a precondition of the loan was that the three-year backlog of audits had to be completed. Could these new auditors get that job accomplished? The CFO did not know the answer to that question. What he did know was that a thorough, highly professional audit would need to be conducted in order to win the confidence of the lending institution -- particularly in light of recent highly-publicized episodes of political interference and corruption in several prominent Bahamian public corporations and agencies, as reported in Bahamian newspapers.

The Bahamas was a country with a population of 350,000. The CFO quietly questioned whether newspaper reports pointed to 'one-off incidences' or to a widespread pattern of corruption and political inference within the public sector? He also wondered whether the college's governing board's appointment of new auditors was politically motivated.

The authors developed the case, based on actual events, for class discussion rather than to illustrate either effective or ineffective handling of the situation. Names of people and institutions disguised. The case, instructor's manual, and synopsis submitted to the North American Case Research Association (NACRA) for its annual meeting, October 6-8, 2016, Las Vegas, Nevada. Contact person: Marlo Murphy-Braynen, University of South Florida, Tampa, Florida, marlom@mail.usf.edu.

IN THE EYE OF THE STORM:
CHIPOTLE MEXICAN GRILL IN 2016

Vijaya Narapareddy, University of Denver
H.G. Parsa, University of Denver
& Nancy Sampson, University of Denver

Case Objectives and Use

This case developed from secondary sources can be used in undergraduate or graduate courses in Corporate Strategy, Corporate Social Responsibility, and Hospitality & Tourism Management courses. It can also be used in stand-alone workshops. After reading and discussing this case in class, students would be able to:

1. **Examine** an organization's strategies and its performance through multiple lenses (i.e., strategic positioning, financial, and marketing perspectives);
2. **Evaluate** the company's corporate governance; and
3. **Decide** whether or not investors should sell their stake in the company following the food contamination crisis.

Synopsis

This case developed from secondary sources describes the founding of Chipotle Mexican Grill (Chipotle, hereafter) in 1993 by Steve Ells and its rapid ascent to popularity as a fast-casual restaurant based on its unique and socially responsible Food with Integrity strategy. Under the leadership of founder-CEO Steve Ells and co-CEO Montgomery Moran, Chipotle outperformed the S&P 500 as well as its rivals since its IPO in 2006. However, in 2015, the multiple food contamination outbreaks reversed its course, plunging its stock price to an all-time low. In spite of the prompt actions taken by Chipotle's leadership, the company did not regain its pre-scandal highs in the stock market. To add fuel to the fire, on May31, 2016 the Nightly Business Report revealed that the Fidelity Contra Fund pared its investment in Chipotle down by about 21% and that Chipotle's stock was depressed by about 40% since the multiple scandals had erupted nationwide. This case gives students the opportunity to step into the shoes of individual investors to assess the challenges the company faced and decide whether or not they should divest their holdings in Chipotle.

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 anonymously peer reviewed and accepted by the North American Case Research Association (NACRA) for its Annual Meeting, October 6-8, 2016, Las Vegas, Nevada. Contact person: Vijaya Narapareddy, University of Denver, vnarapar@du.edu.

BOARD STOOPS TO CONQUER THE CEO:
END OF A POWER STRUGGLE*

P Rameshan, Indian Institute of Management (IIM) Kozhikode

Case Objectives and Use

This case has been intended for use in the Graduate/Post-Graduate level programmes in Business Administration or Management or in executive education programmes. The case is specifically useful in courses related to Corporate Governance, Board Dynamics, Leadership, Organizational Behaviour, and Corporate Ethics.

Multiple objectives are expected to be met by analyzing this case. These are:

1. To understand the internal governance environment of a company.
2. To understand the impact of internal power equations of a company on the morale of its people.
3. To analyze both (a) the inconsistency between the stated goals of an organization and the revealed actions of its top decision makers and (b) the lack of restraint on the power struggle among the top actors of the organization.
4. To identify effective strategies for addressing such issues in future so that their fallouts are minimized.

Synopsis

The case relates to the imminent departure of Raamit Pell, the founding CEO of Xcelent Services, an educational service provider, to the parental Headquarters (HQ), Kozerton, after completing his current 5-year tenure. He had earlier moved from Kozerton to take up as CEO of Xcelent Services. Many of Raamit's senior executives were not happy about his decision. They felt that his departure at this moment might, on the one hand, slow down the ongoing major expansion plans and, on the other, aggravate a mutiny, under covert Board patronage, involving a powerful clique of certain senior executives. Raamit tried to pacify and convince the friendly senior executives about the inevitability of his departure; but, unconvinced, they chose to represent to the HQ.

The HQ appealed to Raamit to continue for some more time; however, Raamit explained to the HQ why it was desirable for him to return. He explained to his HQ senior how in the past 5 years he was caught in a power struggle involving the Chairman and 4 members of Xcelent's Board and how the Chairman was continuously frustrating him because he could not agree to the unethical tendencies of the Chairman and to the attempt of the Chairman and 4 members to wrest the operational control of the unit. HQ finally agrees to release him.

On the day of Raamit's farewell, where, surprisingly, even the clique members were present, many executives appeared sad. Looking at the mood, Raamit wondered whether his decision to return to Kozerton was right.

The author developed this disguised case, based on actual events, for class discussion rather than to illustrate either effective or ineffective handling of the situation. Names of people and organizations have been disguised. The case and teaching note were anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016.
 Contact person: P Rameshan, Professor, IIM Kozhikode, IIM Campus PO, Kozhikode, India. +91-495-2809431. rameshan@iimk.ac.in.

THE GRIM(M) STORY: FAR FROM A FAIRY TALE

Syeda Maseeha Qumer, IBS Hyderabad
Debapratim Purkayastha, IBS Hyderabad

Case Objectives and Use

This case is meant for MBA students as a part of their Business Ethics/ Leadership/ Organizational Behavior/ Human Resource Management curriculum. It can also be used in Executive education programs. One of the main audiences for this case is human resources offices that offer training for staff and administrators and academic managers who are confronted with bullying in their units or departments. This case may also be of interest to higher education leaders who are concerned with workplace bullying and individuals who are working to challenge institutional leaders to create more civil workplaces. This case is designed to enable students to:

- Understand issues related to workplace bullying in general and in higher education workplaces in particular.
- Identify the factors that drove Grimm to commit suicide.
- Examine the potential dark side of leadership, goal-setting, and performance management.
- Explore ways in which a victim can find a voice when faced with workplace bullying.
- Recognize the need to implement norms to prevent workplace bullying in an organization and explore actions that ICL could take to address this issue.

Synopsis

The case highlights the tragic case of Stefan Grimm (Grimm), a medical professor at Imperial College London (ICL) with a strong publication record, who committed suicide in September 2014, reportedly after being under intense and sustained pressure from his superiors over his failure to meet research funding targets. Grimm apparently left behind an email that accused his superiors of bullying through demands that he garner research grants worth £200,000 every year. In the months leading up to his death, Grimm was under intense pressure to perform or face redundancy. He is reportedly to have felt let down by ICL because he did not receive sufficient support from management despite having a strong publication record. In his last email, Grimm lamented that ICL was not a university anymore but a business with a very few up in the hierarchy “profiteering and the rest of us are milked for money”.

Following this, critics alleged that researchers doing high quality research work were often bullied by their superiors to meet huge grant targets and many of them were driven to despair. According to some academics, ICL was run like a business, hungry for performance benchmarks. They alleged that the senior management team was pursuing policies that turned a blind eye to bullying being used as a tool to sustain the capitalist exploitative regime. As the criticism of ICL became more strident, a senior group led by James Stirling (Stirling), Provost of ICL, had to swiftly take stock of the situation and implement changes. How do they ensure that such a tragic event do not happen again?

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Debapratim Purkayastha, IBS Hyderabad, #52, Nagarjuna Hills, Punjagutta, Hyderabad – 500082, India, (91) 9701017110, debapratimp@gmail.com.

HEALTHSOUTH REHABILITATION CFO:
HOW CAN YOU TURN THE WAGON AROUND?

Marlene M. Reed, Baylor University
Mitchell Neubert, Baylor University

Case Objectives and Use

This case was developed to be used in either a strategic management or ethics course at the point in the course when the topic of corporate governance is discussed. The material covered in the case would be relevant in both an undergraduate or graduate course. The objectives of the course are the following:

- To identify and evaluate factors that cause individuals to commit fraud;
- To explain how the culture of HealthSouth led eventually to the fraud; and
- To propose options available to the CFO while he was still employed at HealthSouth and after he had retired.

Synopsis

This case recounts the founding of HealthSouth Rehabilitation, its rapid growth, financial mishandlings and the struggle former CFO Aaron Beam had in dealing with a conscience that kept him awake at night. Beam had met HealthSouth founder Richard Scrushy when applying for a job with Lifemark Hospital Corporation in Texas in 1980. After Lifemark was bought by AMI in 1983, Scrushy invited Beam to join him in the launching of his new company in Birmingham, Alabama. The uniqueness of the hospital was that it would provide inpatient surgery for those who had suffered an injury, but it would also provide outpatient services such as rehabilitation, nutrition guidance and psychological counseling.

By 1996, the top executives of the company realized that they would not be able to meet Wall Street analysts' forecasts which would affect the price of their stock and reduce their holdings. They decided to "cook the books" temporarily to meet quarterly expectations. However, once the financial mishandling had begun, the executives found it difficult to reverse their actions and report accurate numbers to the public. Beam decided to retire from the company in 1996; and after this action, he continued to find it difficult to sleep at night because of his involvement in the fraud. The issue in the case is whether Beam should consider coming forward and revealing to the Securities and Exchange Commission how the books had been doctored so that he could salvage his damaged conscience.

The authors developed this case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and instructor's manual were anonymously peer reviewed and accepted by the North American Case Research Association (NACRA) for its annual meeting in October, 2016, in Las Vegas, NV. Contact person: Marlene Reed, Baylor University, Marlene_Reed@baylor.edu.

AN UNCOMFORTABLE BOARD MEMBER: THE CASE OF INTERBOLSA HOLDING

Rolando Roncancio Ranchid PhD, INALDE Business School - Universidad de la Sabana

Case Objectives and Use

It is a case referred to the development of the area of corporate governance, and can be used in different programs, both of Executive Education, as of MBAs in second year. Also, in the field of in company programs and in board specifically courses. The case works much better when the participants have had experience in boards. This case explores topics related to corporate governance in particular boards and committees of boards (specifically the audit committee), corporate reputation and the fiduciary duties of members of the board of directors, as well as the relationship between the board and the direction team strong in the fulfilment of these fiduciary duties.
This case aims to show the value of professional work and independence of a member of a board of directors, as a fundamental pillar in the framework of the corporate governance bodies: Board and committees of board. It also advocates that the participants will reflect on the responsibilities of being a member of a board of directors and its realization in the work as it is concreted, as a mean to confront diligently the responsibilities of directors and managers.

Synopsis

InterBolsa S.A. was a broker of the Colombian stock exchange, which operated from 1991 until 2012, when it was intervened by the Financial Superintendence after failing to comply with an obligation that it had with the BBVA bank. At the peak of its development, it had the largest revenues over the rest of brokers in the country, it ventured into countless businesses and markets, came to be the largest broker with a 34% market share between more than 30 Colombian market brokerage firms, and led their owners to enjoy a business success that all stock broker would envy. However, a business of repos failed, led the company to risk all their liquidity, and in addition to that endless evidence that their practices were not reliable went public, and put eyes on their corporate governance system. Regarded as the largest stock market crash in Colombia, as well as the biggest corporate scandal, the bankruptcy of InterBolsa covers many issues to be discussed; among which are the responsibility of the regulatory entities of the country, such as the Finance Superintendence, societies, and the same government, or transparency and regulation that has the Colombian stock market, among others. This case, in contrast, delves into the meetings of the board of directors of the holding company of InterBolsa, reliving the relationship and interaction between its members and the directive team of the company; and specifically by presenting the diligence of Alba Luz Hoyos Naranjo, a principal member of the Board and Chairman of the Audit Committee, whose participation has been highlighted since her entry eight months before the intervention of the firm.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Rolando Roncancio Ranchid, INALDE BS - Universidad de la Sabana, Km. 7, Autopista Norte, Chía, Colombia, +578614444, rolandorora@unisabana.edu.co.

DIGITAL TECHNOLOGIES AND OPERATIONS

Chair: Joan Ramon Mallart, ESADE
Joanra.mallart@escade.edu

Co-Chair: Javier Busquets, ESADE
Xavier.busquets@esade.edu

FINTECH: DELIVERING ANALYTICAL DATA TO CUSTOMERS USING CLOUD SERVICES

Clinton Daniel (student author), University of South Florida
Janis L. Gogan (faculty supervisor), Bentley University

Case Objectives and Use

This case can be used by professors who are teaching undergraduate or graduate courses with content related to managing information systems, information technology, or cloud services. This case assumes that the student will have introductory knowledge of database systems. The objectives are:

- Review three cloud-based providers for decision on managing organizational data: Microsoft Azure, Google Cloud Platform, and Amazon Web Services (AWS).

- Learn how to apply these cloud-based providers to a Test Use Case.

- Explore different factors that CIOs could consider when making a decision to choose one information system over another on a mission critical project.

Synopsis

This case, based on an actual project by a privately owned company called Fintech, describes a critical information management decision that a CIO must make for his company. Joe Kwo, Executive Vice President and CIO of Fintech, has been given the responsibility to move forward with a project that involves moving analytical data to the cloud. This project would provide Fintech with new capabilities to deliver its analytical data to customers nationwide in the alcohol industry.

Kwo first has his IT staff gather information on each of the three cloud providers based on IT staff resources, analytics staff resources, IT consulting expertise, training, cost management, system administration, customer support, security, programmability, database support and scalability, and availability of services provided. Next, he asks his IT staff to apply a Test Use Case scenario to each of the three cloud providers. Finally, he calls a meeting with his IT staff to review the results of the information gathered and the Test Use Case. During this meeting, Kwo asks his staff to summarize the key differences in the three cloud providers so that he can collectively make a decision for Fintech. As the case closes, Kwo has enough information to make an executive decision on which cloud service is best for his company's future.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Clinton Daniel, University of South Florida, 4202 E. Fowler Ave., BSN 3403, Tampa, Florida, 33620, 352-428-6024, cedanie2@usf.edu.

LEAN LEADERSHIP AT AUDITION ASSEMBLY PLANT: IS IT POSSIBLE?

Lisa Eshbach, Ferris State University

Case Objectives and Use

The case is designed to be used in a course in which students focus on lean systems and leadership as a method to improve overall organization efficiency. This case would be useful in graduate-level or upper-level undergraduate courses relating to operations management, lean systems, lean culture and leadership. It could also use in an Industrial Engineering undergraduate and graduate level curriculum that focuses on lean concepts/principles. The case was written for business school undergraduate and graduate level courses in lean systems, operations management and leadership. This case allows students to study the importance and impact that organizational structure has on a lean change initiative. The case focuses on the lean tools used in a lean manufacturing situation, the type of leadership, coaching process and culture required with implementing and sustaining a lean change initiative.

Specific case objectives include:

1. Identify the lean tools associated with the lean manufacturing systems approach.
2. Compare and contrast core behaviors and practices that characterize lean leadership and traditional management.
3. Develop an action plan that creates a problem solving culture to support a lean environment for sustaining optimal employee and operational performance.

Synopsis

Audition Assembly thought they had taken the correct steps to implement lean manufacturing correctly. However, the plant did not realize the amount of improvements expected from Motown Manufacturing and Ralph Miller, Audition Assembly plant manager. While the plant experienced some gains in the safety, quality and floor space areas, they were still experiencing issues with total cost and delivering products on time to the customer. They continued to be behind schedule. This situation caused them to work overtime and expedite their shipments via truck (instead of rail) thereby, increasing the overall labor and transportation costs respectively.

The case provides a general overview of the factors involved in implementing lean in a manufacturing setting using a traditional, top-down management approach. It evaluates the various lean tools and metrics used to assess progress with the application of lean manufacturing. Miller is exploring options to sustain its modest achievements, through the continuous improvement, but also create a more employee-centric work environment that would generate sustainable and continuous process improvements.

The author developed the case for class discussion rather than to illustrate either effective of ineffective handling of the situation. Names of people and institutions have been disguised. The case and teaching note were anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV October 6-8, 2016. Contact person: Lisa Eshbach, Ferris State University, Big Rapids, MI, eshbacl@ferris.edu.

DIGICEL IPO LAUNCH…ABORT, ABORT!

Paul A. Golding and Venesa M. Tennant
University of Technology, Jamaica

Case Objectives and Use

This Digicel case provides students with an overview of the growth of a privately held cellular company, owned by Denis O'Brien, that had expanded by acquisition, primarily in the Caribbean. The market was undergoing both convergence and disruption simultaneously. Digicel decided to launch an IPO to support its business expansion strategy. The case may be taught to final year undergraduate and graduate students in Telecommunications, Investment and Strategy. Specific learning objectives of the case include:

- To evaluate Competition in the telecommunications industry
- To understand convergence, innovation and disruption in the telecommunications and cable industry
- To examine the use of dual class shares to fund technology companies
- To understand governance and connected companies
- To study the key industry indicators in evaluating investments in a telecommunications company

Synopsis

Taking advantage of the deregulation in telecommunications sector in the Caribbean, Digicel entered the Jamaican market in 2001. Digicel, a privately held company quickly usurped the dominance of the incumbent, Cable and Wireless, in the mobile segment of the market, using a strategy of affordable phones and a user-friendly approach to mass marketing. The strategy developed in Jamaica was used to enter other small under-developed markets in the Caribbean and Central America where telecoms network could be built out relatively cheaply and, so, challenge the incumbent (the former monopoly) by competing aggressively on price, backed with sharp marketing.

In 2014, Digicel commenced a strategic change, with an evolution from pure mobile to becoming a communications and entertainment provider. This evolution included the expansion of its product offerings through developing its Business Solutions services and entering Cable TV and Broadband businesses, which had lower penetration rates than the Mobile business in Digicel's markets. To fund the expansion and reduce its mounting debt, Digicel's founder and chairman, Dennis O'Brien, decided to raise equity by issuing an initial public offering (IPO) on the New York Stock Exchange. However, O'Brien surprised observers when he cancelled the IPO in October 2015, days before the shares were to be listed on the New York Stock Exchange.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Paul A. Golding, University of Technology, Jamaica, 237 Old Hope Road, Kingston, 1-876-927-1680-8, pgolding@utech.edu.jm.

MULTIASISTENCIA: FACING DIGITAL TRANSFORMATION

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

Case Objectives and Use

With this case, our aim is to let students understand and analyse a business ecosystem exploring the value of the relationships between different companies as well as the role of digital technologies. The case has the following learning objectives: (1) to encourage critical and analytical thinking to understand the design principles (strategy, operations and technology) in ecosystems to understand its evolution on time. Second, students need to place in CEO's shoes to understand areas of disruption and opportunities given by digitalization and the appearance of competition. Third, students need to define design principles to cope with that situation and define future scenarios to compete. The case is a good example of the strategic dialog between digital technologies and business ecosystems to better understand design principles and rules of action and decision making. The case is very rich and has many angles from where instructors can tackle business ecosystem design, digital transformation opportunities and threads and business model innovation. The case has been written for MsC; MBA and Executive Education. The range and depth of discussion will depend on student maturity and background and time available. The case has a 23-minute DVD containing interviews with Multiasistencia managers. The video material is in Spanish and subtitled in English.

Synopsis

The case starts with Javier Bartolomé, the Multiasitencia's CEO prepating a Board Meeting. Multiasistencia was founded in the early 80s in Spain, by Nicolás Luca de Tena, creating during the 90's a network-based service called the "Comprehensive Claim Management Service" (CCMS). In 2016, the firm offered home repair services to its 100 Corporate Clients such as Financial Institutions and Insurance Companies which attend to some 8 Million end customers, managing a network of some 6.000 Trade Professionals (SME and self-employee). The service is offered either as part of a fully comprehensive household insurance policy, or as a customer loyalty service in the highly competitive financial and insurance markets of Spain, France, Portugal, Italy and Brazil. The group attends to the European users of its services from an International Control Centre located on the outskirts of Madrid which receives the calls and deploys the jobs to a Trade Professional Network and during the 2000's deployed and advanced digital platform to coordinate all actions in that ecosystem.

The case shows the history of the firm and the deployment of digital platforms, mobile internet and data systems showing how those technologies changed the structure of the Multiasistencia's ecosystem. The challenge presented in this case is about the potential threads of digitalization, namely (1) new trends on Smart Home including new technology entrants such as Google Home or Samsung; (2) the digital effects on banking leading to fewer institutions and different access channels to customer base (3) digital consumerization and risk management and (4) globalization. Those strategic changes lead to more personalization, more levels of real time data, and interaction with customers affecting key aspects of the business model.

Students are asked to place in Javier Bartolome´s shoes understanding the ecosystem changes, propose scenarios and a course of action to define a strategic leapfrog.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Javier Busquets, ESADE, Universidad Ramon Llull, Barcelona, +34 93 280 6162, xavier.busquets@esade.edu.

ENTREPRENEURSHIP/SMALL BUSINESS/FAMILY BUSINESS

Chair: Chris Cassidy, Sam Houston State University
Cassidy@shsu.edu

RWANDA TRADING COMPANY: FACING A CASH FLOW CRISIS

Kendall Artz, Marlene M. Reed, and Colene Coldwell
Baylor University

Case Objectives and Use

This case was developed to be used in an undergraduate entrepreneurship course. It could be taught at a point in the course in which the topic of cash flow management is introduced. At the conclusion of the case discussion, the student should be able to:

- Explain the meaning of the term "social entrepreneurship" and its application to the Rwanda Trading Company;
- Trace the supply chain for the global coffee industry including whom assumes the risk at each step in the chain; and
- Develop a plan that would allow Rwanda Trading Company to deal with the 180-day receivables procedure that JAB had placed upon them.

Synopsis

This case is about a for-profit social enterprise in Rwanda named the Rwanda Trading Company (RTC) which purchases coffee beans from coffee growers in the country, roasts the beans and exports them to other countries. The company was begun in 2009 by Todd Brogdon who also managed the organization. The primary goals of the company were twofold: (1) Have an impact on the poorest of the poor in the country; and (2) To be profitable. RTC had been able to achieve these goals since its founding by working with the Rwandan coffee growers on a multi-year agricultural training program which taught the farmers how to care for the coffee trees, how to prune, how to mulch, and how to pick the beans. The farmers were also instructed on the operation of the global coffee industry.

All had gone well until the spring of 2016 when RTC entered into a contract with a German company named JAB which owned such coffee companies as Caribou and Green Mountain (which was owned by Keurig). A provision in the contract RTC signed with JAB was that their company would carry 180-day receivables. Todd immediately realized that this would lead to a serious cash flow problem that would threaten all of the good work they had been able to perform with the Rwandan coffee growers.

The authors developed this case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and instructor's manual were anonymously peer reviewed for presentation at the North American Case Research Association (NACRA) converence, Las Vegas, NV, October 6-8, 2016. . Contact person is Kendall Artz, Baylor University, Kendall_Artz@baylor.edu.

GAZELLA WIFI - NAVIGATING THE SOCIAL WI-FI MARKET

Thao Minh Hoang and Juhana Polso Juhana Polso (student authors)
Dr. Erin Pleggenkuhle-Miles (faculty supervisor)
University of Nebraska Omaha

Case Objectives and Use

The case objectives are:

1. Give examples of marketing and strategic challenges that startups may face.
2. Help students apply their knowledge of the Porter's Five Forces framework to determine competitive intensity and attractiveness of an industry.
3. Help students apply their knowledge of the Delta model to identify optimal strategic positioning for a startup.
4. Help students apply their marketing and strategy knowledge to improve a start-up's value propositions and marketing mix.

This case is most useful to both undergraduate and graduate students majoring in entrepreneurship, marketing, or business strategy, because it focuses on the development of a value proposition, analysis of competitive environment, and positioning strategy. As a result of completing this case study, students will not only gain a better understanding of the various obstacles that many start-up firms face but they will also learn how to approach these issues in a strategic way.

Synopsis

In fall 2015, Eric Burns and DJ Akers founded Gazella Wifi, a social Wi-Fi firm that helped restaurant owners collect customer data such as email addresses and social media profiles through Wi-Fi logins. After several months of developing the Gazella device, the partners achieved initial success by pre-selling to nearly 60 restaurant locations, but as interest towards their firm begun to rise, they were struggling to finalize and launch a stable version of the actual product. Their experience with the restaurant industry, sales, marketing, and Wi-Fi technology, were well aligned with the business, but difficulties with the product's firmware and shortage of cash were placing the firm in an uncomfortable situation.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016.
Contact person: Erin Pleggenkuhle-Miles, University of Nebraska at Omaha, 6708 Pine Street Mammel Hall 303V, Omaha, Nebraska 68182, 402-554-2744, erinpmiles@unomaha.edu.

COW COMFORT:
A CASE STUDY IN SUSTAINABLE ENTREPRENEURSHIP

Joy M. Pahl, St. Norbert College

Case Objectives and Use

The case may be used in courses that include topics related to entrepreneurship, small business management, strategic management, family business management, sustainability, and succession planning. It may be used at the undergraduate or graduate level.

The case describes a business involved in the dairy industry. This is an industry that many students may feel an affinity to, but not a familiarity with. A general overview of the dairy industry allows students to appreciate how the entrepreneur recognized an opportunity to enter the industry in a way that others had missed. Also, the fact that the entrepreneur identified an economically viable use for an industrial waste product is another relevant topic to explore. The case objectives are:

- To identify and evaluate factors associated with successful entrepreneurship—including the concept of "alertness"
- To help students understand some of the highlights and challenges related to entrepreneurial ventures and family businesses
- To describe and analyze the value proposition of a business
- To identify and evaluate the growth challenges facing the business and to make informed recommendations that address these challenges
- To evaluate and recommend an appropriate business valuation method
- To discuss succession planning issues, in particular, in a family business

Synopsis

This case describes the evolution of Lynn Heemeyer's entrepreneurial and family venture, Alternative Animal Bedding (AAB). The Heemeyers live in Northeast Wisconsin, where two of the largest industries are dairy farming and papermaking. Dairy farms have a continual need for bedding material for cows. However, each bedding alternative—straw, sand, sawdust, reclaimed solids—has its disadvantages. Lynn Heemeyer recognized an opportunity to address these disadvantages by tapping into a new source of bedding material: a waste byproduct of recycled paper, which was generated at a nearby paper company. This case examines the progression of Heemeyer's entrepreneurial venture: (1) the idea phase and the motives driving the idea: animal welfare and comfort; environmental sustainability; economic gain, (2) the challenges encountered; (3) the growth phase which required additional employees—family members and non-family members; and (4) succession planning. The case is set in September 2015, when AAB seemed to be at a turning point in its 5-year history: it was wrapping up its first appearance at the World Dairy Expo as a vendor and exhibitor, sales were taking off, and Lynn's daughter, Jess, had joined the business on a full time basis. Jess knew that AAB had room to grow, but how best to grow the business was the question. However, given her parents' stage in life and their gradual transference of responsibility to Jess, a clear succession plan was called for. Finally, she wondered what steps should be taken to maintain control over the resources and capabilities that made AAB an increasingly valuable enterprise.

The author developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Joy Pahl, St. Norbert College, 100 Grant St., De Pere, WI 54115; (920) 403-3236; joy.pahl@snc.edu.

MILES DAVIS' DILEMMA

Robert D. Perkins, University of West Florida
Miles Davis, owner and chief trainer, CrossFit South Cobb

Case Objectives and Use

The case was designed to acquaint students with several fundamental issues of entrepreneurship, including the entrepreneur's motivations, persistence and survival, product/service differentiation, and coping with unexpected competition. While the problems faced by the co-author/protagonist are suitable for study by students at both the undergraduate and MBA level in small business and entrepreneurship courses, the case serves well as an introductory learning module.

Synopsis

The fitness industry was shaken in 2000 by an innovation called CrossFit. Pioneered by Greg Glassman, the new strength and conditioning approach was based upon the physiologically sound mantra, "constantly varied, high intensity, functional movements." Exercise tools at the CrossFit gyms were old-fashioned and crude--kettlebells, climbing ropes, giant truck tires, and Olympic weights. There were no mirrors, spa pools or chrome-plated machines.

Yet in the next couple of years CrossFit, Inc. affiliated gyms began popping up across the globe and accelerated rapidly when the CrossFit games became a sporting event of television in 2005. Most of the early clients were dedicated young athletes. The phenomenon generated "cult-like" communities of raving fans within the gyms. Miles Davis, a successful salesman and fitness enthusiast, read an article about CrossFit. It amazed him and he was intrigued. He found a Crossfit gym and loved the workouts. and became a coach. He was a natural at teaching people to improve their fitness. He then passed the CrossFit, Inc. certification test.

In 2009, Miles studied CrossFit gyms, wrote a business plan and decided to be an entrepreneur as a Crossfit owner. Next, he found the perfect location in Cobb country, a suburban neighborhood outside Atlanta, Georgia. No other CrossFit affiliate operated within five miles, although CrossFit offered no exclusive territories. He decided to launch his own gym. He expected to sign-up 50 clients in the first three to five months, but after two months, he had only 6. Then he learned a competitor was opening a CrossFit gym only 200 yards away.
Both gyms added clients slowly during the next year, and in January of 2011 Miles found he had a total of only 36 clients. Worse, he did not have enough cash to pay his rent. Waiting to meet his landlord, he paced inside his cold gym, considering what he should. He felt anxiety and many other feelings. Finally, after struggling with the problems, Miles had made his 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 was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Robert Perkins, University of West Florida, Perkins1500@gmail.com.

CONFLICTING BUSINESS APPROACHES OF TWO GENERATIONS: THE OTSUKA FAMILY SHOWDOWN

Debapratim Purkayastha and Ranjana Tiwari
IBS Hyderabad

Case Objectives and Use

This case is meant for MBA students as a part of Family Business Management curriculum. It can be also used in a Leadership and Business Strategy curriculum. This case will enable the students to:

- Understand issues and challenges in family business management.
- Understand the importance of adapting to a changing environment and the challenges for a family business in pursuing long-term growth.
- Understand the leadership issues and challenges and conflict that might arise due to differences in the business approaches of two generations.
- Understand the importance of succession planning in family businesses.

Synopsis

Otsuka Kagu Ltd. (OKL) was established by Katsuhisa Otsuka (Katsuhisa) in 1969 and since then it was known for its luxury and super comfortable products. The founder introduced the unique membership system which became the reason of dispute between him and his daughter Kumiko Otsuka (Kumiko), in the new millennium. During the growth period of the economy in Japan the company generated handsome revenues and profits. But as soon as recession hit Japan, the disposable income of youth became unstable; they started looking for other cheaper and non-branded options. Their needs were catered by other small furniture retail chains which were in their growth phase like IKEA, Nitori Holdings Ltd, Muji. It led to huge losses for the company. Katsuhisa handed over the position of President to Kumiko in 2009. The daughter with her new strategies and business idea was able to turn the company into profit though gradually. She decided to discontinue the old membership business model and opened small and cheaper outlets to boost the sales. The father could not take the changes positively and he decided to expel the daughter from the post of president in July 2014. He restarted all the old practices at the stores and closed the small outlets which were opened by the daughter. In January 2015, the members of the board decided to reappoint the daughter as president since profits of OKL were going down. In the same meeting, Katsuhisa proposed the change of entire members of board in the next general shareholders meeting. In the meeting, both daughter and father presented their contrasting proposals to the shareholders. Kumiko prevailed but the problems for OKL were far from over.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Debapratim Purkayastha, IBS Hyderabad, #52, Nagarjuna Hills, Punjagutta, Hyderabad – 500082, India, (91) 9701017110, debapratimp@gmail.com.

MANAGING A GROWING BUSINESS: THE XELEUM CASE

Mark P. Rice, Worcester Polytechnic Institute

Case Objectives and Use

It is anticipated that the case will be taught in an MBA Program toward the end of an entrepreneurship course dealing with issues related to effectively managing growing enterprises. Students are expected to develop insights about the assessing past performance of an established but still relatively small entrepreneurial firm during its first five years in business; and the challenges an entrepreneur faces in accelerating the growth of the business. Students will gain skill in developing alternative strategies for dealing with these issues and challenges, and defending their decisions about which strategies they would implement if they were to take on the role of the entrepreneur.

Synopsis

Bob Diamond was a serial entrepreneur with an impressive track record of success in launching new products and new ventures. His latest venture, Xeleum Lighting LLC, founded in 2011, developed and commercialized advanced LED lighting systems. Xeleum relied on an electronics factory in China, established to provide products for Diamond's previous ventures, for the manufacture of its LED lighting systems. The firm relied on a variety of channels for generating revenues: manufacturer's representatives, energy service companies, and Xeleum's own internal sales and marketing processes. In its first five years, Xeleum had grown its payroll to eighteen employees. The LED lighting industry was rapidly maturing – with global companies dominating the market, such as Philips, General Electric, and Cree. By 2013 the share of global lighting market revenue attributable to the global top 10 LED lighting manufacturers was 61 percent. Though Xeleum remained a relatively small player, it was confident that its products were equal to or better than those of its competitors; its prices were competitive or lower; and its responsiveness to its customers was unexcelled. However, its major competitors possessed far greater sales reach, which -- together with their brand power -- provided them with visibility and marketplace exposure commensurate with their size.

In later 2015 and early 2016, Diamond's was developing strategies for accelerating the growth of his firm, while also sustaining Xeleum's track record of superior customer responsiveness – a key source of competitive advantage. Diamond anticipated that identifying and implementing strategies for growing the firm could put an extra burden on the senior leadership team with respect to talent identification, recruiting, development and retention. He also wondered if he needed to rethink Xeleum's financial and business models in order to support his growth objectives. Xeleum had been able to self-finance its growth during the first five years with the support of bank financing, but had not yet attempted to attract equity financing. Diamond wondered if that would be necessary or advisable in order to accelerate growth, and if so, how he should proceed. Finally, Diamond was considering whether Xeleum needed to revise its sales and marketing strategy in order to accelerate growth. If so, what should it be and how can Xeleum make it happen?

The author developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Mark P. Rice, Worcester Polytechnic Institute, Foisie School of Business, 100 Institute Road, Worcester MA 01609, 508-831-4675, rice@wpi.edu.

MONMOUTH RUBBER & PLASTICS

Stuart Rosenberg, Monmouth University

Case Objectives and Use

This case illustrates the importance of maintaining strong values when managing a small business through difficult times. This case is suitable for courses in small business management or in family business management. It can be especially useful as an introductory case or a second case.

The learning objectives of this case are: (1) to understand the factors that can help a small business succeed; (2) to evaluate a small business in terms of its strengths, weaknesses, opportunities, and threats; and (3) to utilize the insights gained in the analysis of a small business to recommend a course of action.

Synopsis

John Bonforte, the owner and president of Monmouth Rubber & Plastics, a small private rubber manufacturing company in Long Branch, New Jersey, needed to decide whether to accept an offer to sell the business. Monmouth had been a successful company since John founded it in 1964, but now in 2008 there were a number of factors that gave him reason for concern and to consider whether it was time to sell.

The world economy had plunged deeply into a recession. Other rubber manufacturers were forced to close down. Sales at Monmouth began to stall, and the long term forecast was not promising.

The city of Long Branch, which had been in decline for years, had invoked eminent domain in 1996, citing that it was in the public interest to declare 86 acres in need of improvement. The private homeowners and commercial business owners who were located in the designated area were compelled to negotiate with a property developer that had been contracted by the city to undertake a large redevelopment project. Many property owners refused to sell, and the case was on appeal with the New Jersey Superior Court. Given the uncertainty in connection with the eminent domain, John had purchased a facility in Riverside, New Jersey. However, he was afraid that Monmouth's employees would find the hour and a half commute to be excessive. He also didn't really like the Riverside facility. John was getting older. At 67, he was able to sell the business and retire. Although his son, John Jr., had been employed by Monmouth for several years and had risen to become the number two person in the company, there was no succession plan. With a lucrative offer on the table, John needed to consider his age in addition to the weakened economic conditions and the eminent domain.

The author developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Stuart Rosenberg, Monmouth University, Leon Hess Business School, West Long Branch, NJ 07764, 732-263-5297, srosenbe@monmouth.edu.

TECHNOLOGY BUSINESS INCUBATOR AT NATIONAL INSTITUTE OF TECHNOLOGY CALICUT: WAY FORWARD

Shubham Sharma, KPMG Advisory Services (Student Author)
Joffi Thomas, IIM Kozhikode (Faculty Advisor)

Case Objectives and Use

The case is developed to- (i) help participants understand the operations of a business incubator and chart a growth plan to attain its objectives (ii) to assess the impact of the business incubator on the parent institution and offer recommendations to attain synergetic goals and (iii) to appreciate the relevance of incubator centers for value creation and job generation potential.

The case could be used in a session dealing with- "Managing a Business Incubator" - for incubator managers or academicians or administrators in educational institutions or regulatory authorities or in a session on "Incubation of a Business Idea" - in an elective course on " Entrepreneurship" or in a post-graduate management/ entrepreneurship program to familiarize participants with the ecosystem for supporting entrepreneurs.

Synopsis

The case is about the origin and growth of Technology Business Incubator (TBI) at National Institute of Technology (NIT) Calicut, India. The development of TBI at NIT Calicut could be described in three stages- (i) 2003-08 as "setting- up"; (ii) 2008- 2010- "transition" and 2010- 14 as "alignment and growth".

Preethi had been the Manager of the TBI from its inception in November 2003. The goal of the incubator was to support and mentor start-up companies in Information Technology (IT) and Electronics industry. TBI had incubated 42 start-ups; 80% of had survived and a few have grown to reach employee strength of over fifty employees by 2014. Given the teething problems of the incubator in its initial years, Preethi considered the survival of TBI itself as an accomplishment; however she was convinced that there was immense potential for the TBI to make a much stronger impact at the national level with proper planning and necessary support from the parent institution.

Preethi wanted to chart a growth plan for the TBI at NIT and make a stronger impact on attaining synergistic common goals of the parent institute and the TBI. The plan was to be presented in the upcoming BOG meeting scheduled a few days later. As she was working through the presentation slides, she thought of various ways to grow TBI and make a much meaningful impact to NITC and the entrepreneurial community. A number of concerns surfaced; she recollected her discussion with the Dean about the growth plans of TBI, sometime earlier-

(a)How could TBI garner more active involvement and support from NITC and its various stakeholders including faculty and students?

(b) How could it attract promising start- ups and at the same time accelerate their growth?

(c)What are the ways to generate necessary finances and enhance infrastructural facilities and TBI services to fuel its growth plans?

She had to address these concerns in charting the growth plan for the incubator.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Joffi Thomas, IIM Kozhikode, Faculty Block 1/17, +919746380925, joffithomas@iimk.ac.in.

MARKETING/INTERNATIONAL BUSINESS

Chair: Javier Silva, IAE Business School
jsilva@iae.edu.ar

i-TIFFIN:
PRODUCT– SERVICE INTEGRATION DILEMMA

Sivakumar Alur, VIT University Vellore India
Sulagna Mukherjee, TAPMI Manipal India

Case Objectives and Use

This case is appropriate for use in a Strategic Marketing Management course. The instructor can illustrate a marketer's key challenges in integrating product and service. This case fits in when the course discusses issues in services marketing. Since the setting is India, a developing country, this case fits also in an International Marketing course to highlight specifically the issues in food and healthcare services marketing. At a higher level, an instructor can use this case in the marketing elective on food and healthcare services marketing. The case is appropriate for use at the postgraduate level and in executive education.

The objectives are:

1. Analyze various strategic paths for product service integration
2. Identify the right path for product-service integration
3. Compare and contrast the major factors that influence integration
4. Draw a roadmap for product service integration

Synopsis

In January 2015, Tapan Kumar Das founder CEO of i-Tiffin was in a dilemma whether Qua Nutrition's nutrition counselling services need to be integrated with meal plans of i-Tiffin. In 2013, Tapan along with his IIM-A classmates started i-Tiffin. I-Tiffin provided high quality nutritious calorie defined meal plans that clients could order online. In 2012, Tapan and his team had founded Qua Nutrition a signature nutrition clinic that specialized in counselling clients on nutritious meal plans. Until January 2015, i-Tiffin's products and Qua's services were not integrated. Tapan was wondering whether integrating the product and service would serve both the firms

---

The authors developed the case for class discussion rather than to illustrate either effective or in effective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: A Sivakumar, Professor, VIT Business School, VIT University, Vellore, India, +91-9483210107, sivakumar.a@vit.ac.in.

TRIBUTE: A BIODYNAMIC LUXURY WINE

Marieshka Barton (student author), Sonoma State University

Case Objectives and Use

This wine-marketing case can be used in an MBA marketing management course to illustrate decisions about whether to maintain, expand, or discontinue a strategic business unit involving a sustainably made luxury product used to build brand identity and enhance a company's broad market line-extension portfolio. Questions in the instructor's manual build from strategic evaluation to strategic formulation culminating in a marketing plan.

Understand and Describe

1. Learn about the wine industry and recognize the natural wine category as a unique segment and value proposition (case reading)
2. Identify "luxury marketing" practices used in the wine industry and evaluate luxury on-premise market entry (question 1)

Apply and Analyze

3. Use theory, strategic analysis tools, and financials to interpret BFW's current position and identify opportunities to sustain a competitive advantage (question 2 and 3)

Evaluate and Create

4. Weigh alternative solutions to formulate and recommend a strategic marketing plan (question 4 and 5)

Synopsis

Benziger Family Winery's (BFW) charismatic founder and winemaker, Mike Benziger, envisioned BFW's flagship wine, Tribute, being positioned as a luxury good and placed in fine-dining restaurants. Tribute was a Bordeaux-blend Biodynamic estate wine from Sonoma County, CA, an unconventional wine choice compared to Napa Cabernet Sauvignon. In 2014, Tribute realized phenomenal success in the direct-to-consumer channel as winery tour guides primed lifestyle tourists with BFW's Biodynamic vineyard tour, but success in the national luxury channel was not as easy to secure. Wine purchase decisions are event specific, and the high-end steakhouse client was not as inclined to try something new. Tribute was a small production item and promoting it in the national market took considerable effort by Benziger family members. Conflict increased among family members presented with the dilemma to further support Tribute or pull it from the wholesale market. There were reasons such as prestige and press attention to pursue national restaurant accounts. And, Tribute's luxury positioning was used to elevate BFW's brand identity and help drive sales for its line extension wines, which made deciding to pull or keep Tribute in distribution a difficult 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 was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Marieshka Barton, Sonoma State Univserity, 1801 E Cotati Ave, Rohnert Park, CA 94928, 707-664-2880, marieshkabarton@gmail.com.

HOUSE OF BOUNCE

B. Tod Cox and Ram Subramanian
Stetson University

Case Objectives and Use

This is a case that involves analyzing and interpreting marketing research that is both qualitative (focus group) and quantitative (conjoint analysis). This case is suited for a marketing course at both the undergraduate and graduate levels. It is best used after students are familiar with the concept and techniques of marketing research.
The specific learning objectives include:

- To demonstrate how small businesses can take full advantage of the strategy and market research methodologies when assessing a new business opportunity.
- To help students understand the strengths and limitations of qualitative research techniques such as customer interviews and focus groups.
- To help students understand the strengths and limitations of conjoint analysis.

Synopsis

Tom Feldman took a buyout from a large technology company and used part of the money to enroll in the MBA program of a reputed university in the metropolitan Houston, Texas area. While in the MBA program, Tom began evaluating potential businesses with the objective of identifying one that would suit his needs. As part of a MBA course in marketing, Tom put together a student team to conduct marketing research on an opportunity to open a party center in Houston. After his team completed the study, Tom had both financial and marketing data to make a decision about the launch.

The authors developed this case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case, instructor's manual, and synopsis were anonymously peer reviewed and accepted by the North American Case Research Association (NACRA) for its annual meeting, October 6-8, 2016, Las Vegas, NV. Contact person: Ram Subramanian, Stetson University, DeLand, FL, 421 N. Woodland Blvd., Unit 8398, DeLand, FL 32723, 386-822-7956, subram1@stetson.edu.

HOTEL IPSUM BOGOTA:
A MARKETING AND COMMERCIAL STRATEGY TO SURVIVE

Ramon Diaz-Bernardo, IE Business School

Case Objectives and Use

The case HOTEL IPSUM: A MARKETING AND COMMERCIAL STRATEGY TO SURVIVE was designed for use in first year MBA level course in marketing management, usually at the end of the course after the students have been through the marketing mix concepts. It can also be used in a second-year MBA course or executive education course in Marketing Strategy and Marketing Plan. It can be used as well with upper-level undergraduates if the instructor sets up the discussion and assignment questions to the fit the level of the students.
The main objective of the case is doing a full Marketing Plan for an existing product with the double objective of attracting new customers and increasing retention among the existing customer base. The case provides all the information and data needed to build a full Marketing and Commercial Plan.

Synopsis

Hotel Ipsum is an upscale hotel located in one of the best areas of Bogotá, Colombia. In 2012, after two years of operation, the hotel is performing quite well in terms of occupancy rate and average daily rate but the owners are disappointed with the profitability of their investment in the hotel and are considering selling the property.
Rafael Escobedo, the general manager of Hotel Ipsum has to put together a marketing and commercial plan to increase occupancy rate and average daily rate in order to meet the return on investment expectations of the owners. With the objective of delivering a 6% return on the property investment Rafael has to define a full marketing plan to attract new customers and to increase loyalty (repetition) among the customer he already has. Within his new marketing plan he must define a marketing budget and he must choose the marketing tools that he would include in his marketing plan.

The author developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Ramon Diaz-Bernardo, IE Business School, Maria de Molina, 12-5, Madrid, Spain, +34915689600, ramon.diaz@ie.edu.

WATCHING A TRAIN WRECK IN SLOW MOTION: THE UNION PEARSON EXPRESS

Eric Dolansky, Brock University

Case Objectives and Use

This case is focused on pricing, and in particular on how the pricing decision fits within the rest of the marketing plan. The link between pricing and positioning is a key part of the case, and the interplay between these two marketing plan elements forms the heart of the decision in the case. Through the use of quantitative and qualitative analysis students can be pushed to make a decision that involves important tradeoffs and presents less than optimal outcomes. This case can be used to enhance a student's ability to make hard decisions where there is no easy answer, while at the same time bringing in relevant marketing theories, ranging from high-level (consistency within a marketing plan) to specific (the role of price elasticity, value to the consumer).
This case is appropriate for advanced undergraduate courses and graduate courses in marketing, marketing strategy, or pricing.

Synopsis

In February 2016 Kathy Haley, president of the Union Pearson Express (UPX) train, was being pressured to lower the fare price. The rail link between Union Station in downtown Toronto and Pearson International Airport had only been running for eight months, but ridership was well below targets; on average the train ran at only 10% of capacity and current revenue only covered 35% of operating costs. The UPX was a high-profile transit project for the province of Ontario and the city of Toronto, and had received a lot of attention in the press. Though the launch in June 2015 had been on-time, on-budget, and well-received, there soon came criticism of the marketing of the train, particularly the prices. Haley and her team had set the one-way fare price at $27.50 to reflect the high-value positioning of the train and the sophisticated business travellers that were her target market.

Within months of opening, the number of passengers was disconcertingly low. Haley had attempted to combat this both in the press and with marketing actions. She and her team had pointed to entrenched consumer behaviours regarding travel, and had offered discounts and promotions to boost ridership, which had ultimately failed. In early 2016, both consumers and politicians called for fares to be lowered. With ridership levels so low, though, and a great deal of internal and external pressure to revise the price, Haley had to decide whether to lower fares or not, and what the plan would be for the UPX going forward.

The author developed this case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, Nevada, October 6-8, 2016. Contact person: Eric Dolansky, Brock University, 1812 Sir Isaac Brock Way, St. Catharines, Ontario, Canada, L2S 3A1, 905-688-5550, edolansky@brocku.ca.

JEAN LEON (A): TIME FOR REPOSITIONING?

Josep Franch, ESADE Business School
Xavier Lesauvage, ESADE Business School

Case Objectives and Use

The *Jean Leon (A): Time for Repositioning?* is the first of a two-case series that has been designed for a core course on Strategic Marketing or on Marketing Management. This case should be used in a session on positioning, typically scheduled at the end of the first half of the course or on a branding session, often at the beginning of the second half of the course. The second case, *Jean Leon (B): Are We Going Too Far?*, should be used in a communication session, usually scheduled in the second half of the course, towards the end. The main learning objectives are to:

- To evaluate the current situation of the Jean Leon brand.
- To identify and assess the positioning options for Jean Leon.
- To discuss the brand associations based on the desired positioning.
- To make a recommendation of what Jean Leon should do.

These two cases are intended for use in a wide range of programmes: BBA degrees, MSc programmes in management, MBA programmes in various formats (Full-Time, Executive and/or Global Executive MBA) and/or Executive Education programmes where sessions or modules on positioning or branding and communication are included. The level of complexity or difficulty of these two cases is intermediate.

Synopsis

Jean Leon was born in Spain. Without a penny, he migrated to the US in 1948. In 1956, he founded La Scala restaurant in Beverly Hills. It became the favourite restaurant of Hollywood's actors and actresses and the best Italian restaurant in the US. In 1962, he founded the Jean Leon winery in Spain, on the lines of a Bordeaux château. Jean Leon was the first to plant cabernet sauvignon and chardonnay varieties in Spain. Some of his wines were served at The White House when Ronald Reagan became US President. Leon's wines were later shortlisted by *Wines* magazine as among the world's top ten. When he found out that he was terminally ill, he sold his boutique winery to the Torres family in 1994. The Torres family agreed to manage the winery, look after the land and the workers, retain the Jean Leon brand heritage and its boutique winery character, keeping it separate from the Torres brand.

In 2012, Mireia Torres Maczasseck — Jean Leon's General Manager — was facing a real challenge. Even though sales revenues had been growing until 2007, they had been declining since the severe downturn in the Spanish economy in the same year, and old stocks had been building up in the cellars until 2010. She was also well aware that her remit was to steer Jean Leon towards profitability, growth and focus. Could she pull it off?

The authors developed this case, based on actual events, for class discussion rather than to illustrate either effective or ineffective handling of the situation. The authors would like to thank Mireia Torres Maczassek, Director of the Jean Leon winery and Chief Winemaking Consultant for the Torres Group, for the information and assistance provided. The case and teaching notes were anonymously peer-reviewed and accepted for presentation at the NACRA 2016 Conference, Las Vegas, Nevada, October 6-8, 2016. Contact person: Josep Franch, ESADE Business School, Barcelona, Spain, josep.franch@esade.edu.

REDEFINING THE SUPER BOWL

Michael M. Goldman
Nola Agha
Maximillian Duran
University of San Francisco

Case Objectives and Use

The case is designed for a broad range of students and courses. While the content is designed for Sport Management students, the Super Bowl is culturally significant enough that students in a variety of majors could benefit from the case. Enough data is included to analyze economic impact, social impact, and a net benefit making the case useful in classes devoted to economics, finance, event management, marketing, and sociology of sport. This case allows students to:

- Calculate the net economic impact of hosting a Super Bowl by analyzing and estimating both financial gains and costs.
- Evaluate the social impacts of the Super Bowl.
- Discuss the degree to which economic and social impacts can be compared and contrasted.
- Assess the extent to which Super Bowl generates a net positive benefit to a host city.

Synopsis

Super Bowl 50 was hosted in the San Francisco Bay Area on February 7th, 2016. This case study documents the Host Committee's intent to redefine how a Super Bowl is hosted, by making it the most giving, most shared, and most participatory Super Bowl ever. The case follows the Host Committee chairman Daniel Lurie's attempt to evaluate the economic and social impact of hosting the game, given the wide range of data and perceptions after the event. In this way, the case details the geographic scope of the event, and the related accommodation, transportation, and societal implications.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Michael M. Goldman, University of San Francisco, 2130 Fulton Street, San Francisco, CA, 510-809-6200, mmgoldman@usfca.edu.

BUILDING THE BRIGHTROCK BRAND THROUGH CHANGE

Michael M. Goldman, University of San Francisco
Mignon Reyneke, Gordon Institute of Business Science, University of Pretoria
Tendai Mhizha, Gordon Institute of Business Science, University of Pretoria

Case Objectives and Use

This case is appropriate for an undergraduate or graduate-level program in marketing management, and allows students to engage with classical marketing tenets of branding, media and communications decisions and content marketing within a management framework. Upon completion of the case study discussion successful students will be able to:

- Critique the development of a services brand.
- Integrate paid, owned and earned media to increase communication effectiveness and efficiency.
- Critique a content marketing strategy.

Synopsis

Suzanne Stevens was part of a group of four former senior employees of a large life insurance firm who decided to establish a new & innovative South African insurance company, BrightRock. They identified a gap in a large and highly competitive, (albeit generic and opaque) insurance market and developed a distinctive positioning within the market. There was low consumer understanding of the technical aspects of life insurance products, while no existing life insurance product provided an individualised offering. Stevens developed the company's brand and marketing strategy, by drawing on reputation drivers, traditional advertising, and a content marketing approach. BrightRock focused on Change Moments in consumers' lives, including getting married, having children or getting a new job, and changed the standard insurance product model by launching an individualised flexible product that could adapt with the consumer through their various life stages. The case study documents the first three years of BrightRock's operations, with a strong focus on brand and product development, distribution, and communication. The case dilemma involves choices Stevens faced at the beginning of 2015 about marketing investments across paid, earned and owned media.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Michael M. Goldman, University of San Francisco, 2130 Fulton Street, San Francisco, CA, 510-809-6200, mmgoldman@usfca.edu.

WIL'S GRILL

Leonard R. Hostetter, Jr. and Nita Paden
Northern Arizona University

Case Objectives and Use

This case can be used in a marketing, small business or entrepreneurial management course at the undergraduate level that covers the topics of brand positioning, brand marketing, business to consumer marketing, small business marketing or entrepreneurial management. The objectives are:

- Identify key factors leading to the current success of an organization.
- Analyze market research findings and describe how the data should be used for strategic decisions.
- Describe the current positioning strategy and offer suggestions for repositioning.
- Evaluate conditions that could support repositioning and conditions that could negatively affect repositioning.

Synopsis

This is an undisguised case based on actual events surrounding the launch of Wil's Grill, a "street food" business founded in January 2014 by two Northern Arizona University students, John Christ and Karl Shilhanek during their junior year. In February 2015, John reincorporated Wil's Grill as a sole proprietorship assuming full responsibility for the entire operation.

John Christ realized that he had to expand his Northern Arizona customer base beyond "street food" that the business was founded upon. Expansion into catering and special events would provide a steadier, more predictable and larger revenue opportunity. He commissioned a team of Northern Arizona University marketing students to complete a marketing research study on Wil's Grill, providing him with greater insight on brand awareness, communications, types of food, and pricing, among other things. As the case closes, John understands that Wil's Grill was poised for growth, yet challenges existed. He needed a positioning strategy for his fledgling business that embraced his passion for sustainability, and clean and locally sourced food.

The authors developed this case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6 – 8, 2016. Contact person: Leonard R. Hostetter, Jr., Northern Arizona University, The W.A. Franke College of Business, 81 McConnell Drive, P.O. Box 15066, Flagstaff, AZ 86011-5066, 901.304.9889, Len.Hostetter@nau.edu.

GLAZER CHILDREN'S MUSEUM
DREAM IT. BE IT.

Vjollca Hysenlika, USF Muma College of Business
Loran Tripp Jarrett, USF Muma College of Business

Case Objective and Use

The case is created for students in a marketing or strategy class to learn about how a children's museum functions and what it takes to run, create and sustain a successful non-profit organization. The objectives are:

- Learn about the challenges of non-profit development and fundraising
- Recognize the importance of rebranding, digital marketing, and public relations in non-profit
- Recognize the significance of collaborations and partnerships with partners and competitors, and increase memberships and visitors

Synopsis

This case study discussed Glazer Children's Museum and its new Chief Executive Officer (CEO), Jennifer Stancil, as she worked to transform the downtown Tampa museum into a world-class learning environment for children and families.

Hired on November 23, 2015, Stancil knew the museum faced challenges as they attempted to increase memberships and visitors, collaborate with local competitors and partners, and raise funds. Stancil was aware that executing a just-completed strategic plan would require a huge effort, since the Tampa Bay community was not very aware of Glazer Children's Museum's purpose and myriad activities. The museum's main goal was to develop and maintain stronger ties with other Tampa museums, schools, daycare centers, sports teams, hospitals, universities and more.

The authors developed this case, based on actual events, for class discussion rather than to illustrate either effective or ineffective leading of a non-profit. The case, instructor's manual, and synopsis were anonymously peer reviewed and accepted by the North American Case Research Association (NACRA) for its annual meeting, October 6-8, 2016, in Las Vegas, NV. Contact person: Vjollca Hysenlika and Loran Tripp Jarret, USF Muma College of Business, Tampa, Florida, vhysenli@mail.usf.edu and loranjarrett@gmail.com.

KAVIARI: PURE CAVIAR

Ronald G. Kamin, Savine Ruaud, and Peter Daly

Case Objectives and Use

This case study has three objectives. The first is to explore the caviar market in France. The multitude of players (producers, “traders/merchant-affineurs”, importers, food brands), the interactions of the various distribution channels (wholesalers, retailers, fine food stores, direct sales), the sophistication of the product itself (the numerous sturgeon species, countries of origin, “subjective” attitudes about caviar, the legacy of the product, but also the raw materials that are subject to much commercial venture) make for a complex market, which is all the more opaque, given that some key success factors are specific to the different subsets that constitute them. First of all, the students need to define the market in which Kaviari’s business is evolving, and identify and understand the issues the CEO is experiencing.

The second objective requires an in-depth study of the competitive position of Kaviari by analyzing and also extrapolating from the quantitative analytical data available. These reflections will enable the students to devise a segmentation approach, including targeting and positioning, prior to discussing potential marketing strategies.
The final objective is to reach a decision. The students must be able to respond to the challenges faced by Kaviari, with particular reference to the key success factors of the market segments in relation to the competitive advantages of the “trader/merchant-affineur”.

The case is constructed and written for a group discussion of 90 minutes. It is intended for an audience of university or business school students with a Bachelor-level knowledge of Marketing.

Synopsis

Formerly served at the court of Russia at major imperial banquets, caviar from wild sturgeon has long been viewed as a luxury food reserved for a sumptuous elite. However, since the ban on wild fishing in the Caspian Sea in 2006, nearly 90% of the caviar consumed worldwide now came from farms. Owing to the diversity of caviar from different sturgeon species, the value proposition offered by the major companies specializing in fine and luxury grocery products, and more recently food brands in supermarkets, is now at the heart of a consumer perception battle.
On the one side, there was the producer, who held the secrets of sturgeon farming and caviar production, and on the other, the “trader-affineur” (refiner), experienced in global caviar selection and the intelligent art of “affinage”. This meant that marketing had an important role to play in the positioning and buying decisions of this iconic product.
Karin Nebot, 43, CEO and shareholder of Kaviar, located in the heart of Paris, put the case for the legitimacy of the “trader-affineur”: "*Caviar is now at a turning point. More and more quantities are produced, and more and more farmers want to become caviar traders.”* At the approach of the 2015-2016 holiday season, Nebot questioned what Kaviari ought to do in order to preserve its competitive advantage: "*Trade relations between professionals and consumers differ significantly and are sometimes even complimentary. The trader has a head start, but what is our ‘business model’ for the future?*"

Questions about the future of the trader/merchant model abound for Nebot. Two types of short-term strategies emerge in such a threatening competitive environment: one - extend the luxury segment or open up to a wider public. In other words, what should Kaviari do to preserve its competitive advantage, and what would the role be for the trader/merchant in a global and ever-changing market?

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Ronald G. Kamin, 33610359179, ronaldkamin@hotmail.fr.

FUELCELL ENERGY: IS NOW THE RIGHT TIME TO ENTER CHINA'S CLEAN ENERGY MARKET?

Karen L Koza, DBA, Western Connecticut State University
A. Ben Oumlil, Ph.D., Western Connecticut State University
Laura Amodeo, MBA, Boehringer Ingelheim

Case Objectives and Use

This case is intended for use in a variety of courses at both the undergraduate and graduate levels including: international business, international marketing, marketing, strategic management, and sustainability management courses. The objectives of this case are:

- Describe the concept of competitive advantage and its sources through a discussion of FuelCell Energy's success in the U.S. and Korea.
- Evaluate whether FCE can transfer many of its competitive advantages in the US and Korean market to the China clean energy market.
- Analyze the China clean energy market and the issues FCE will face should it enter / operate in this market.
- Evaluate the importance of Intellectual Property protection in a global business strategy for high technology companies.
- Evaluate and recommend strategies that FCE should consider if it decides to enter the China clean energy market. Propose and defend a course of action regarding current health information technology usage.

Synopsis

It was 5 pm on a Friday afternoon, Ben Toby had just returned to his office after a long meeting. The agenda had focused on an issue that Ben had been struggling with for several months: should FuelCell Energy (FCE) enter China's energy market with its stationary fuel cells? Stationary fuel cells were a type of fuel cell used in buildings or power generation parks. This was a question that Ben was ultimately responsible for deciding.
Ben Toby joined FCE as the Vice President of Global Business Development in 2003. Since joining, he has played an important role in positioning FCE as a strong player in the global energy market, primarily through his work in Japan and South Korea. Ben was then faced with evaluating the Chinese energy market and determining whether the timing for market entry was now for FCE.

Ben knew that China intended to generate at least 15 percent of total energy output by 2020 using clean energy sources as the government aimed to shift to a less-resource intense economy. Further, China was the world's top investor in clean energy projects, having invested around $120 billion to $160 billion between 2007 and 2010, and projecting to spend another $1.54 trillion over the next 15 years (Campbell, 2010; Kwan, DeWoskin & Smith, 2010). However, there were also many potential downsides to the China market, including IP protection, strong government control over the energy sector, strong government control over the Internet, etc. Ben needs to weigh carefully both the pros and cons of entering this market.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Karen L Koza, Western Connecticut State University, 181 White Street Ancell School of Business, Danbury, Connecticut, 86810, 203-837-9036, kozak@wcsu.edu.

VIETTIRE'S EXPANSION STRATEGY IN MYANMAR

Yen Le, Northeastern University
Ngoc Nguyen, Northeastern University

Case Objectives and Use

This case is intended for many advanced undergraduate or graduate courses in International Business, (particularly in Foreign Market Entry and/or The Strategy of International Business chapter), International Marketing Management or Strategic Leadership. It focuses on the firm itself and is designed to prompt a discussion of the Firm in foreign market expansion, and the actions managers can take to control difficulties/risks and compete more effectively as international business. The case helps readers understand how firms can increase their profitability and utilize their opportunity by expanding their operations in foreign markets. This case contains issues relating to strategic fit of existing organizational capabilities & resources with those international penetration strategies in foreign country.

- Understand the basic decisions that firms contemplating foreign expansion must make: which markets to enter, when to enter those markets, and on what scale.
- Recognize the current strategic decisions an organization facing: positioning, portfolio, and market expansion approaches.
- Learn how to develop an effective strategic plan.
- Be familiar with different strategies for competing globally and their pros and cons.
- Evaluate various strategic options & decision in accordance with company's resources & capabilities.

Synopsis

This case describes a progress of expanding business into Myanmar market of a Vietnamese firm. It deals with a common strategic decision, how best to expand into a foreign market. Mr. Hoang- General Director and Founder of Viettire Joint Stock Company (Viettire) was wondering how Viettire should expand its existing business into Myanmar with as Viettire being granted a new trademark license on developing the Maxxis brand name in here. Viettire is one of the top distributors for tires in Vietnam market. Over 20 years, its reputation has been strongly building. Recognizing potential development and number of vehicles growth, Mr. Hoang wants to embark on this overseas investment. Hence, Viettire's board of managements was considering such a new strategic direction for Viettire. They believed this was a good opportunity to gain the market share compared with other entrants and competitive rivals. If Viettire hesitated to invest, others definitely jumped in with a first mover advantage. However,

Mr. Hoang was worried about what strategic option he should adopt in order to approach this new market while ensure a strategic fit to its company's resources and capabilities and also to the overall market demands of the tire industry environment in both countries. Finding the right answer for these questions will strengthen Viettire's position in the international market.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Yen le, Northeastern University, hoangyan86@yahoo.com.

KIDZANIA:
DIFFERENTIATION AND GROWTH STRATEGY

Andres Terech, UCLA Anderson School of Management
Martha Rivera Pesquera, IPADE Business School
María Guadalupe Torres, IPADE Business School

Case Objectives and Use

This case is appropriate for both undergraduate and graduate level courses. It can be used in the second term marketing course of the first-year MBA Program or elective courses in Marketing Strategy, Brand Management, or Entertainment Marketing. Given the strategic focus of the case, it also works well in Executive Education Programs. The learning objectives are:

- To illustrate a creative win-win business model in the challenging and crowded entertainment industry and assess its sustainability in the long term.
- To analyze KidZania's experiential marketing strategy and its role in building the brand.
- To teach brand positioning by uncovering points of parities and differences.
- To showcase different opportunities for brand extension and assess them, given the changes in consumer behavior, competition land space, and available company resources.
- To discuss the role of sponsorship as a promotional tool in a context of diminishing effectiveness of advertising spending.

Synopsis

In 2016, Xavier Lopez Ancona, president and co-founder of KidZania—a Mexican company with 16 years of international success in developing and operating theme parks where children could play as grown-ups and pretend to be adults assuming the role of countless professions—needed to decide how to continue to differentiate the brand and grow revenue in a very competitive and dynamic market.

Around the world, the revolutionary and innovative edu-tainment concept, originally developed by KidZania, was the model with the most copycats in the world. In China alone, they had estimated more than 51 similar businesses. Direct competitors were also emerging at a steady pace in Latin America, the Middle East and Europe. Additionally, new and traditional indirect competitors could be found in every corner of the entertainment space. From museums that promote learning and entertainment, to destination theme parks, Disney apps and Nickelodeon content.

Xavier Lopez Ancona and his executive team were discussing four possible growth strategies: Growth in number of current parks to continue building scale as a defensive strategy, developing smaller parks to target smaller cities where the current format was not sustainable, developing an interactive platform that could bring together the growing digital market and the role-playing experiential learning, or transforming the company into a content development enterprise.

All of four options were attractive, but resources were scarce. Xavier's team needed to recommend the best alternative to pursue to the Board of Directors.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Andres Terech, UCLA Anderson, 110 Westwood Plaza B514, Los Angeles, California 9004, 310-206-4170, aterech@anderson.ucla.edu.

MOLSON COORS CANADA: BREWING BEYOND BEER

Karin Schnarr, Wilfrid Laurier University
Kendra Hart, Mount Royal University

Case Objectives and Use

The case can be used in an undergraduate and graduate introductory course on marketing. It combines both strategic analysis and tactical recommendations, requiring students to tie all key points together in one integrated plan. The key issues in the case are to determine how Molson Coors Canada (Molson) can best grow the market for, and their presence in, the non-alcoholic beer category. Students will be required to assess a selection of strategic alternatives for growth, understand the direct and indirect nature of competition, and create an integrated set of recommendations to help in both market creation and penetration. Students will develop skills in identifying and analyzing growth strategies, market segmentation, pricing, distribution, and promotions.

Synopsis

Kristina Viduka, an Innovation Manager at Molson Coors Canada (Molson) in February, 2016 was considering how to grow the non-alcoholic (non-alc) beverage category of Molson's business. Non-alc beer was defined as beer with less than 0.5% alcohol by volume (ABV) and was distributed like other consumer packaged goods (e.g., shampoo). In Canada, Molson had two non-alc products: Molson .5% that was sold only in Quebec; and, Molson Exel that was available in the rest of Canada. However, they had a broad variety of successful non-alc products that they produced and sold in other markets, notably Europe. While Molson did limited marketing around its non-alc products, the category overall was growing, particularly among millennial and generation x consumers. Molson Exel was the non-alc market leader in Canada by both sales and volume; however, there was an increasing number of domestic and international competitors in both the branded and private-label categories. In developing implementable options, Viduka had to assess product development, product extensions, market penetration, production, pricing, consumer segmentation, promotion, and competitive responses.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Karin Schnarr, Wilfrid Laurier University, 75 University Ave. W., Waterloo, Ontario, Canada N2L 3C5, 226-234-0653, kschnarr@wlu.ca.

NISSIN FOODS

Ignacio Osuna Soto – INALDE Business School
Javier J. O. Silva – IAE Business School
Charles Muller Sanchez – INALDE Business School

Case Objectives and Use

Assessing a marketing plan of a recent launch based on market research and decide whether to change the strategy and therefore the marketing plan, significantly boosting the current plan making major adjustments or keeping the current plan with minor adjustments to meet organizational goals.
During this process, participants should:

- Explore the relationship between consumer behavior and marketing strategy.
- Understand the importance of selecting the appropriate channel based on market conditions, the characteristics of the distribution, consumer behavior and the nature of the product.
- Consider how the process of implementing communication actions, product price and selecting different channels affects value creation and penetration of the category in the market.
- Know particularities of Latin America in implementing a marketing plan of an internationalizing company.
- Conduct a thorough quantitative analysis to determine the most appropriate actions in order to achieve proposed business goals.
- Establish argumentative lines to explain and convince the corporate of which is the most convenient strategy from the analysis of the case decision.

The case was written to be used in courses on marketing management in MBA and Executive Education, specifically on issues related to marketing plan, how to implement the marketing strategy, with increased emphasis on channel management, retail in Latin America, and internationalization. Alternatively, it could be used in undergrad courses.

Synopsis

In March 2014, Daniel Chaparro, National -Sales Manager for Colombia of Nissin Foods, the world leader in production and sale of instant noodles, was astonished looking at his computer, reading his e-mail; he could not believe what he was seeing. He was informed that 60% of the one million units delivered to date were returned. After having selected the internationally best-selling products to enter the Colombian market, Daniel had raised a strategy of mass distribution, at a considered competitive price to meet the demanding sale goals that were set as he joined the company a year ago: 4.6 million units for 2013 and 6 million for 2014. However, he had only pushed 790,000 units through the channel in 2013, in a category that sold 4.79 million units. Daniel had to urgently redesign Nissin's marketing plan to achieve the goal they had committed to with headquarters in Japan, in a country where consumption was extremely low –at less than 0.3 units per capita compared to other countries such as Peru and Mexico, with 4 and 8 units per capita, respectively.

Based on extensive information obtained from market research contracted by Nissin to Nielsen, participants must diagnose the reasons why the target was not achieved and recommend a series of marketing related measures to achieve the goal set for 2014 or if consistently proven as unachievable, suggest a possible new goal.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Javier Jorge Silva, IAE Business School, Pilar, Buenos Aires, Argentina, 0054 2322 481080, javierjosilva@gmail.com.

ORGANIZATIONAL BEHAVIOR/HUMAN RESOURCES

Chair: Margaret Lucero, Texas A&M University, Corpus Christi
Margaret.Lucero@tamucc.edu

TROUBLE IN THE WAREHOUSE

Robert E. Allen and Margaret A. Lucero
Texas A& M University – Corpus Christi

Case Objectives and Use

Its main purpose the "Trouble in the Warehouse" case is to introduce students to negative behaviors often termed counterproductive work behavior (CWB) or deviant workplace behavior and to the steps organizations can take to minimize disruptions caused by these workplace behaviors. CWB and deviant workplace behavior are topics frequently included in human resource management and organizational behavior courses at both the undergraduate and graduate levels. Second, the case focuses specifically on bullying as one form of these negative behaviors. Bullying has been recognized as a relatively widespread problem and an important challenge for managers. Third, the case can be used to examine the broader issue of workplace aggression and the escalation of conflict. A fourth element of this case concerns the role of provocation and how it might influence performance management and the discipline process. This issue could be reserved for inclusion in more advanced undergraduate or graduate human resource management or labor relations classes.

Synopsis

The case involves an egregious example of workplace bullying that took place in a large, unionized grocery warehouse. Eric Rodriguez worked as an order selector in the warehouse. Unfortunately, he had been threatened, intimidated, and verbally abused, that is, bullied, over an extended period of time by one of his coworkers, Jace Duff. After months of mistreatment, Rodriguez finally reached his breaking point. In addition to berating Rodriguez, Duff made the mistake of disparaging Rodriguez's mother, who also worked at the warehouse. Rodriguez angrily confronted Duff while holding a steel rod that had a sharply pointed hook on one end and a handle on the other. The boisterous confrontation that occurred involved a heated verbal exchange of profanity and insults but did not escalate into physical violence. The incident ended after Rodriguez made the point that he could stand up to Duff. Duff then complained to his supervisor that Rodriguez had angrily approached him while holding a weapon. Duff's complaint led to an investigation of the confrontation. As a result of the investigation, both Duff and Rodriguez were terminated for violating the company's zero tolerance for violence policy. Rodriguez challenged the termination decision by filing a grievance. Because the parties could not resolve the grievance, the matter was submitted to arbitration. After a three-day hearing, the arbitrator decided that the company did not have just cause to terminate Eric Rodriguez. The purpose of this case is to identify the reasons the company lost the arbitration case. In particular, the case focuses on the causes, consequences and cures for workplace bullying. The case also looks at bullying as a provocative act that warrants special consideration when making discipline decisions.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6 - 8, 2016. Contact: Robert E. Allen, Texas A & M University – Corpus Christi, College of Business, OCNR 372, 6300 Ocean Drive, Corpus Christi, TX 78412, 361-825-3416, Robert.Allen@tamucc.edu.

THE INCIDENT IN KABUL

Karen E. Boroff, Ph.D. Seton Hall University
Matthew Pratt, Major, United States Army

Case Objectives and Use

This case is suitable for undergraduate and graduate level courses where the construct of conflict management is studied, typically in coursework in organizational behavior. The case presents vivid examples of the sources of conflict, the conflict process, and conflict intensity.

After having studied this case, students will be able to:

1. Understand and apply the conflict management process.
2. Identify the conflict handling intentions available to them in a conflict situation and which ones to apply in different conflict situations.
3. Anticipate antecedent conditions of a potential conflict so as to attenuate the level of a conflict or prevent a conflict situation from arising in the first place.

The case itself is a novel setting, one neither typical in the case literature nor exhibiting the same level of conflict intensity and time urgency. Nonetheless, the case is illustrative of the conflict management process, advancing the case literature library with added attention to conflict's antecedent conditions.

Synopsis

Captain William Waverly was a member of the US Army's forces in Afghanistan, and was stationed in a post in western Kabul. He was the commander of this post, one of the several bases in that city. US soldiers guarded the power plant located at this post. Waverly and his team also launched the security and stability operations from this location. For this latter function, the US Army always conducted security and stability operations jointly with the Afghan municipal police forces. To conduct these operations, the US forces had supplied fuel to the Afghan forces to operate their armored vehicles for city patrols. However, to begin to ensure that the Afghan government was now developing and perfecting its own fuel acquisition, storage, protection, and distribution processes, the two-star US Army general in this region in Afghanistan ordered all US units to stop providing fuel to the Afghan forces. The objective of this order was to make the Afghan government self-reliant on its own fuel procurement and protection processes. When one morning the Afghan police armored trucks pulled up into the post for a patrol and expected gas, a tense situation quickly developed. The head of the Afghan forces, Ghotai Sharma, upon learning from one of Waverly's sergeants that he was not getting gasoline that day, became upset. Sharma drew his pistol, started gesticulating and raised his voice. Sharma's troops swung their gun turrets from their armored vehicles toward the US soldiers and Waverly heard the familiar metallic click associated with Sharma's troops chambering an ammunition round in an AK-47 weapon. At the same time, he heard in his earpiece the chattering from his own US troops as they coordinated who was covering what target among the Afghan police should a firefight break out. In the not too distant past, Waverly had lost, at the hands of Afghan forces who were living as allies with the US troops, a fellow United States Military Academy officer, who was Waverly's roommate in Afghanistan. He knew that his next few steps would be critical in this emerging conflict situation.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8. Contact person: Karen E. Boroff, Seton Hall University, Room 686 Jubilee, 400 South Orange Avenue, South Orange, NJ 07079, 973-761-9597, karen.boroff@shu.edu.

THE ARMY'S NEW EVALUATION REPORTING SYSTEM FOR NONCOMMISSIONED OFFICERS

Karen E. Boroff, Ph.D. Seton Hall University
Alexander Boroff, Captain, United States Army

Case Objectives and Use

With this case, instructors will be able to apply the concepts of performance management and performance appraisal with his/her students as these relate to a newly revised performance management system in the U.S. Army. Students will be able to identify both the anticipated successes as well as the shortfalls in the new process and generalize these successes and shortfalls to other organizations. The case is centered on performance management and, given the increased attention on data analytics, students also recommend the metrics that indicate the process is working. It contributes to the case literature on human resource management in that it centers the reader on the revision of a performance management system. As such, it widens the discourse on performance management, since many existing cases in performance management tend to focus on rating a given employee or describing the pitfalls that may occur in a performance interview.

After having studied this case, students will be able to:

. differentiate between performance management and the performance appraisal form, articulating their respective associated objectives.

. identify the criteria that improve a performance management system.

. put forth a set of recommendations that form the basis of a sound performance management process, grounded in a consideration of relevant metrics of success.

While the case is nested in human resource management, the instructor can also use this case to apply the concepts of change management as it applies to a human resource setting.

Synopsis

Captain Joseph Brunetti was given the assignment to provide his superior officer an analysis of what to expect when the U.S. Army implemented its new process to evaluate the performance of Noncommissioned Officers (NCOs). Brunetti had about 104 NCOs in his unit. The U.S. Army created a new process to evaluate NCOs to overcome the deficiencies in the Army's old process. Under the old process, almost every NCO was rated at the highest levels, making it near impossible for the U.S. Army to know whom to promote to higher ranks. Under the old process, very little counseling took place, so NCOs were not given guidance on how to develop themselves. Raters and senior raters were not held accountable for their work in performance management, either. Under the new process, which included a forced distribution form of ranking, senior raters had to offer counselings as well as options for future assignments. Brunetti, who had only limited experience in rating NCOs anyway, had to prepare what was called an "operations report," outlining what the organization could expect with the changeover to the new process and what may need attention as the process would continue in subsequent years.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8. Contact person: Karen E. Boroff, Seton Hall University, Room 686 Jubilee, 400 South Orange Avenue, South Orange, NJ 07079, 973-761-9597, karen.boroff@shu.edu.

THE BACKBONE OF THE BUSINESS

Denise Hunter Gravatt and Valerie A. Mockus
University of South Florida
FacultyAdvisor: Janis Gogan,
Bentley University and University of South Florida

Case Objectives and Use

This case can be used to support discussion in an MBA-level entrepreneurship course, specifically in a module on managerial challenges of growing beyond the start-up phase. Although this case concerns a health care business arena, the situation it describes is not uncommon; many entrepreneurs running small businesses in many industries encounter challenges like this one. The objectives include the following:

- Review the stages of growth and typical challenges faced by an entrepreneur during small business growth (e.g. introduction of middle management)
- Recognize risks associated with dependence on a single individual in a particular role
- Identify the purposes and advantages of an exit interview
- Identify some of the HR issues that would likely emerge in an entrepreneurial endeavor like a small business: Talent Acquisition and Management

Synopsis

This disguised case is based on actual events and describes the experience of a small business owner, Elana Seacrest, who has unexpectedly lost her only middle manager Marlene Smith during busy season. Seacrest designed this key middle management position to be the singular point of contact between her and the clinical side of her health care service providing company, so she could focus on strategy, marketing, and business development. The middle manager managed the company's clinicians in providing a niche technical service in the operating room during spinal surgeries; Smith also maintained working relationships with surgeons and hospital staff. The reasons for middle management's departure are not known. The case supports discussion of options for coping with the middle manager's departure and stabilizing the company. In addition, the case offers clues that would support a discussion of possible underlying issues, motivators, and circumstances that may have led to the manager's abrupt departure.

In this particular case, there are two issues of concern: 1) the founder has introduced a middle manager role which is not yet well defined (the problem of training and supervision) and 2) she comes to depend on the one individual filling that role (the problem of risky overdependence on a single resource). As the case closes, Seacrest has to decide what her next step should be to resolve the middle management issue and continue to grow her business.

 Contact person: Valerie A. Mockus, University of South Florida, Tampa, FL, mockus@mail.usf.edu.

WHEN IN ROME, DO AS ROMANS DO

Sajjad Haider (Student Author)
School of Management, Lanzhou University, China & Portland State University, USA

Case Objectives and Use

The case is developed with aim of making students better understand the cross-cultural communication and how to manage human resources and programs in a culturally diverse situation. It can be used for classroom discussion, particularly in business management classes, such as HRM, business communication and cross-cultural management. The case could also be used in variety of forums for discussion such as doctoral forums, seminars, workshops etc.

The learning objectives are:

- Students will be able to understand the important of cross-cultural understanding and sensitization in managing across the boundaries.
- It will help understand that "no culture is superior or inferior vis-à-vis others and every culture has its own context, specific needs, pros & cons, strengths and weaknesses".
- Appreciation of diversity goes beyond just accepting it, it should be looking into its unique cultural and organizational settings; and difference is a way of learning.

Synopsis

This case-study is about the cross-cultural management and how it affects the employee relations and ultimately impacts their performance, if not handled properly. The case delves into different situations where understanding of the other cultural values, norms, work practices and human behavior is critical for foreign managers to succeed.
The case entails how a foreign FMCG company faced with the difficult and challenging situation in China. In order to fix the problems, the corporate headquarter sent three of their bright personnel; Janet, Peter and William to China. They were tasked to improve the HR, marketing & sales and distributions channels. Nonetheless, when they landed in the host country, they grappled with a number of challenges arising out of cultural, communication and situational differences. This case talks about these challenges and how to handle them.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Sajjad Haider, Portland State University, Portland, Oregon, 971-801-4297, sajjad.hrm@gmail.com.

PEER FEEDBACK AT STRESS ENGINEERING SERVICES – PROCESS DESIGN FOR THE 21ST CENTURY

(A & B)

Joe Kavanaugh & Sanjay Mehta, Sam Houston State University
Donya Brewer, Matt Mistric, and Kaitlyn Cole, Stress Engineering Services

Case Objectives and Use

The case is an illustrative case that allows students to make numerous decisions as they "take theory to practice." Students are challenged to apply course content as they make decisions on how to transform an existing peer review program and align it with contemporary practices for employee evaluation, growth, and development. The case is primarily intended for use in graduate or advanced undergraduate courses in human resources that contain in-depth content on employee development, 360-degree feedback, performance evaluation, and/or the design of performance evaluation instruments. The case has important elements that address issues in change management and organizational culture, and could be adapted for use in courses that address these topics.

Synopsis

Donya Brewer, the Director of Human Resources at Stress Engineering Services (SES), has been tasked to evaluate the firm's peer feedback system and update it to better align with the organization's needs as it continues to grow in the 21st century. The current system was developed internally, had undergone minor revisions over several decades, used cumbersome proprietary software and, increasingly, was not meeting the needs of managerial/supervisory personnel to provide effective guidance for continuing professional development of employees in all lines of work. Now (2015), Brewer and her project team are tasked to increase the performance of the peer feedback system while preserving the system's role in fostering the collaborative culture at SES.

SES is a highly respected consulting engineering firm in Houston, TX, with offices in New Orleans, Cincinnati, Calgary and Singapore. SES employs approximately 420 engineers, technicians, support, and administrative/professional personnel in eleven practice groups (engineering specializations). It is a strong culture company, with clear core values, that have led to it being recognized several times as one of the best places to work in Houston and in Texas.

The case details the front-end, investigative phase of the project and the gathering of both quantitative and qualitative data to assess the efficacy of the system. Students are presented with the findings and are asked to form decisions about the current status of the system, to identify present issues that must be addressed in the design of the future system, and to make recommendations in numerous areas about what would constitute best practices in the new system.

The case is structured in two parts, A & B. Part A presents the quantitative data for analysis and focuses on data interpretation. Part B presents the qualitative data gathered through structured interviews. Here, students are asked to identify the design issues and formulate recommendations for changes in the peer feedback system and its processes.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016.
Contact person: Joe Kavanaugh, Sam Houston State University, Department of Management & Marketing, Huntsville, TX 77340, 936-294-1236, kavanaugh@shsu.edu.

RESTRUCTURING OF PAKISTAN RAILWAYS BOARD

Dr. Muhammad Abdur Rahman Malik, Lahore University of Management Sciences

Case Objectives and Use

This case is primarily developed for executive trainings, especially for the public sector organizations. This case can also be used at the MBA level for the course on Strategic Human Resource Management in the module of 'Organizational Structure'. Its objectives are to:

- Emphasize the relationship between organizational strategy and its structure.
- Demonstrate the important role of board of directors (BOD), various structural alternates of BOD, and the associated pros and cons with each.
- Highlight the importance of having clarity in roles and responsibilities and issues associated with job ambiguities.

Synopsis

Information Given in the Case: In late 2013, the minister of Pakistan Railways (PR) asked Mr. Hanif Gul, Director Vigilance, PR, to prepare a proposal for the restructuring of PR Board, the highest decision making body for Pak Railways. During the last two decades several ad-hoc and haphazard structural changes, coupled with frequent political interferences had severely affected the performance of Pak Railways. PR, the largest transport sector organization of Pakistan was facing operating losses for several years in row. The existing composition of PR Board was causing a lot of problems, and for all practical purposes, the Board had become ineffective. Due to ad-hoc changes role and jurisdictional ambiguities have increased between the executive committee, CEO and some of the most senior officers of PR.

Hanif was contemplating three possible alternatives for the composition of Board. These were: a relatively smaller board with members from within PR, who can perform effective control over PR; a large board with most of members external to PR to provide strategic leadership and market orientation; or a board that would be combination of the two models mentioned above. He was also exploring the qualities and attributes of a suitable person who can head the board. Should the chairman be an outsider from corporate sector or academia; or an insider with lot of experience of PR.? With the date of Hanif's scheduled meeting with the minister approaching fast, he was willing to finalize the proposal as soon as possible.

Information Hidden in the Case: The case presents a hidden but interesting link between organizational strategy and structure. During the debate on relative merits and demerits of various alternates, astute students may realize that it is difficult to propose a definite structure for PR Board, and a suitable person to head it, without having a clear vision, strategy and role of the PR Board. Discussions on these lines will make it clear that the most important suggestion (of Hanif to Minister PR) should be to finalize the vision and strategy of PR, and the role that PR Board has to perform. These are pre-requisites for any meaningful discussion regarding PR Board, without which any proposal and action would be shooting in the dark.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Muhammad Abdur Rahman Malik, Lahore University of Management Sciences, Room 417, SDSB Building LUMS, DHA, Lahore Cantt Lahore 54792, Pakistan, +92 321 4424 072, abdur.malik@lums.edu.pk.

CAREER AT THE CROSS ROADS (A & B)

Dr. Muhammad Abdur Rahman Malik and Adeel S. Butt
Lahore University of Management Sciences

Case Objectives and Use

This case can be used in the MBA course on Human Resource Management, under the topic of 'Career Development' to demonstrate the challenges that managers have to face while trying to manage their careers. It can also be used to demonstrate the shift in ownership of an employees' career development from an employers' basket to the employee's.

This case can also be used in the MBA course on Organizational Behavior under the topic of 'Person – Job' fit, in order to introduce the concept of career anchors and their significance in making career selection decisions. The key objectives of the case are to:

- Introduce the changes in career development responsibilities, and the factors that managers have to consider while making career related decisions.
- Demonstrate how to evaluate Person – Job fit, using the concept of career anchors. The instructor's manual describes Naeem's career anchors' scores and discusses how this can be assessed using information provided in the case. It also discusses which type of jobs will suit him better. Thus the case can inspire students to know about their own career anchors and to use this information while making their career decisions.

Synopsis

Career at the Cross Roads (A): On November 1, 2012, Naeem Khan, General Manager at Expert Group (into Heavy machinery and Construction related business) was ambivalent about staying at Expert or accepting an offer of "Regional Manager - North, Sales & Administration" from Porsche Pakistan. In wake of this decision were Naeem's trials and tribulations as a manager in the Pakistani scape. How he started his career from Dawn group of newspapers as a record supervisor and works his way up as the General Manager of Expert Services. The case ends while looping back to the beginning where Naeem is contemplating a career move as he seems that his current employer does not appreciate his efforts and vision for the company. As he has recently started his MBA, he would have to work hard to be able to live up to Porsche Pakistan's expectations. Naeem has only a week in which to make his decision about whether or not to leave his current employer. He's not sure if it is the right time to switch jobs.

Career at the Cross Roads (B): Naeem left Expert for Porsche Pakistan. While at Porsche, he shuttled between Islamabad and Lahore on alternative weekends to attend his MBA classes. The workload at Porsche and the travel to Lahore is getting to Naeem. Along his journey, Naeem seems to thrive in situations where he is independent / autonomous and is presented with a challenge. As soon as there is a dearth of these, he seems to lose interest and starts considering other opportunities. At a sales pitch for Porsche to an old customer from Expert he is offered employment on terms he could only wish for. He finds himself at a decision point again whether to stay at Porsche Pakistan or move.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Muhammad Abdur Rahman Malik, Lahore University of Management Sciences, Room 417, SDSB Building LUMS, DHA, Lahore Cantt Lahore 54792, Pakistan, +92 321 4424 072, abdur.malik@lums.edu.pk.

TO EVALUATE OR NOT TO EVALUATE…?

Christina Norton, DBA candidate, University of South Florida

Case Objectives and Use

The case can be used for an HR strategy course (specialization at undergraduate level) or for a focus on people management in an MBA program. The objectives are:

- Explore the multiple objectives of performance evaluations/appraisals across the various stakeholders within a company (consider any distinctions between public and private pressures)
- Evaluate the applicability of competence-based evaluation criteria. Describe how the organizational structure impacts management of performance, motivation, and entrepreneurial spirit.
- Compare and contrast the inferred work expectations from the two different profiles: hospitality graduates and quant jocks. Describe the challenges in implementing the same performance appraisal process for both profiles.
- Explore the challenges of managing independent workers that are client-centric and have a high degree of variability in their day-to-day tasks. How can performance be measured consistently and objectively?

Synopsis

This case, based on actual events, presents the challenges of implementing a transparent performance appraisal system for knowledge workers at a niche pricing and analytics consultancy, RMS. After investing significant time and training, Jim Cook, VP of Operations, questioned whether the effort was a waste of resources?
Just over three years ago, a decision to reform RMS' annual performance review process was met with enthusiasm throughout the company. Along with 20 years of year-on-year growth, the company prided itself on the fact that most of its managers had worked their way up the ranks. RMS leadership attributed the company's success to their talented associates; this was echoed in the company slogan, "trust in numbers and truth in people".
RMS recruited two main profiles:

1) hospitality graduates: strong communication skills with operational experience, and exposure to yield management principles
2) "quantitative jocks": engineers, mathematicians, and IT specialist.

Given the high degree of variability in the work, the Resource Development team developed a standardized skills-assessment form derived from the respective position description of the various roles. The other component of the review process required all associates to write 5 "SMART" goals that would contribute to the success of the company.

Rather than serve as a vehicle for continuous improvement and increased motivation, the review process was met with widespread frustration form the associates. It did not help when Jim read the results of a survey conducted by *Deloitte Consulting*, 58% of executives felt their current performance management approach drove "…neither employee engagement nor high performance" (Buckingham and Goodall, Harvard Business Review, April 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 was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Christina Norton, University of South Florida, 4202 E. Fowler Avenue, Tampa, Florida, 33620, 239-682-6485, canorton@mail.usf.edu.

VIRGIN MOBILE COLOMBIA: CREATING CULTURE IN A START-UP

Juan Manuel Parra, INALDE Business School - Universidad de la Sabana

Case Objectives and Use

This series of cases were originally developed for the closure of a required course on HRM for second year EMBA students and for Executive Education programs, to illustrate the convenience of a human strategy clearly aligned with the business model and strategy.

1. Provide non-HR managers with an example on how a well-designed talent strategy can leverage the whole business strategy, when it's clearly assumed by the CEO and the functional managers.
2. Provide an example on how to penetrate a highly concentrated market, using a radical culture model as its dominant competitive advantage.
3. Analyze how elements of the strategy impact hiring decisions and talent retention.
4. Understand why and how to use talent as a differentiator, considering the standards of an industry, the objectives of the firm and the values of the brand.

Synopsis

In February 2013, the newly created Virgin Mobile LatAm (VMLA) was preparing to launch its service in Colombia, its second test market, in order to develop the business model before going to major markets like Mexico. In Chile, they had made a very big launch with remarkable press coverage, but low sales results. Colombia had a mature market with three major competitors, all of them poorly perceived because of low customer service, expensive rates, unattractive plans, insufficient coverage and contracts seen as "misleading" and restrictive. Juan Velez, CEO of Virgin Mobile Colombia (VMCO), along with his team, wanted to be faithful to the distinctive value of Virgin's brand, very much oriented to high quality service and with "winning the hearts and minds" of customers and employees. Being the face of the company with clients, the recruiting process for sales and the call center would be essential. However, a few months before the launch, none of them were hired, nor did they have an HR department, so hiring depended on each functional manager (**PART A**).

Velez and his team developed a talent management strategy and sought young millennials in bars, clothing shops or in any place where they could find "the right attitude", offering the opposite of what the industry saw as "the regular practice", and with the best working conditions, as an incentive to deliver optimal service and a shared language with the client. At the end of the year, VMCO had a million clients, exceeding the operation of Chile and the only virtual mobile operator of the Colombian market, who slightly exceeded the 300,000 users after three years. Turnover was almost zero in an industry used to rates of 30 to 50%, and people waited in line, three blocks around the HQ, to deliver their CVs. But six months later service fell below the legal limits, causing severe fines. They discovered that 18% call center operators were logging each other in the system to cover absenteeism and delays in schedules (**PART B**).

Shortcomings that generated fines were solved in three months. They didn't fire anyone because it became clear that call center operators, being young millennials from 18 to 25 years old and working for the first time, were not aware of the consequences of those actions and because they themselves proposed their sanctions, wrote the code of conduct, and served as a living example for everybody else (**PART C**).

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Juan Manuel Parra, INALDE BS - Universidad de la Sabana, Km. 7, Autopista Norte, Chía, Colombia, +578614444, juanm.parra@inalde.edu.co.

PROFESSOR OR POLE DANCER? AN UNEXPECTED QUESTION

Meredith Woodwark, Wilfrid Laurier University

Case Objectives and Use

Intended Course

This case is best suited to Leadership courses for senior undergraduate or MBA students. It could also be used in a course on Managing Diversity at either the senior undergraduate or MBA level.

Specific Topic

The case is most relevant to the topic of women and leadership, specifically the challenges they may face.

Learning Objectives

This case will allow students to:

- Recognize and discuss the inappropriate comments that female leaders can face in the workplace
- Analyze the possible motivations and intentions of those who make such comments
- Develop a set of possible responses
- Analyze the risks and benefits of the possible responses
- Determine the best course of action given the circumstances to help diffuse the situation

This case will help female students prepare to handle similar kinds of comments they may encounter. It will also help male students understand the impact of such comments on female leaders.

Although this case specifically examines an example of an inappropriate comment made my a male student to a female professor, the general principles of how to respond when confronted with inappropriate comments by others may extend to other types of inappropriate comments in different situations.

Synopsis

In her second year working at a Canadian business school, forty-one year old professor Dr. Jacqueline Walker is teaching an elective section of a second year undergraduate organizational behaviour course. During the second week of class, the students are working on a group activity. While interacting with a small group of male students at the back of the class, one of them asks her an unexpected and inappropriate question. She must decide quickly how to respond in class.

The author developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Meredith Woodwark, Lazaridis School of Business, Wilfrid Laurier University, 75 University Avenue West, Waterloo, ON, N2L 3C5, Canada, 519.884.0710 X 4886, mwoodwark@wlu.ca.

WORLD WIDE FUND FOR NATURE (WWF) PAKISTAN: A SHIFT TOWARDS A NEW APPRAISAL SYSTEM

Fariha Zahid (student author), Lahore University of Management Sciences
Anwar Khurshid (faculty supervisor), Lahore University of Management Sciences

Case Objectives and Use

This case can be taught effectively to MBA students or executives at any level in courses such as organizational behavior, human resource management, talent management, and management of Civil Society Organizations (CSOs). The positioning of the case could be in the early half of the course while discussing the topics of performance appraisal and employee motivation, particularly to highlight the significance of Key Performance Indicators (KPIs) as an important measure of performance appraisal.
The specific learning objectives are: 1) To enable the students to appreciate the importance of a fair and equitable appraisal system; 2) To familiarize the students with the underlying theories behind an effective appraisal system; 3) To explain the purpose and scope of KPIs as an important tool in performance appraisal; and 4) To identify important rules for devising KPIs.

Synopsis

The case discusses the major challenge faced by World Wide Fund for Nature (WWF), Pakistan, in their performance appraisal system. Although their existing appraisal system was objectives-based, however, the objectives were vague and did not give specific targets to be followed. The result being vague evaluations showing a bias towards lenient ratings in absence of clear targets. Consequently, it was hard to discern a good performer from an average or below average one. Every year employees would get increments on the basis of these ratings which were disproportionate to the efforts being put in by them. This was leading to an overall demotivation and dissatisfaction especially on part of high performers who felt that their hard work was not being rewarded properly. Moreover, the previous Director General served his office for about nineteen years. It had also rooted a culture of inertia in prevailing practices.

Mr. Hammad, after joining as the new Director General, felt the need to have a major revision in their appraisal system to address the above-mentioned problems. He believed that an appraisal system must have clear, identifiable and measurable goals and employees should be appraised fairly on their performance so that good performers should be identified and rewarded accordingly. Hammad was contemplating to convert their appraisal system from vague objectives to clear and measurable key performance indicators (KPIs) for their professional level staff. He had started working on that idea and was weighing up the pros and cons of having a major change in the appraisal system.
Moreover, he was concerned about the operational issues in formulation of KPIs and potential challenges of implementation of the new system in an organization entrenched in a deep-rooted culture.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Anwar Khurshid, Lahore University of Management Sciences, Opposite Sector U, DHA, Lahore, Pakistan, +92-42-35608084, anwar@lums.edu.pk.

SOCIAL ENTREPRENEURSHIP AND SUSTAINABILITY

Chair: Roberta Sawatzky, Okanagan College
rsawatzky@okanagan.ba.ca

THE CITIZENS FOUNDATION: MANAGING ORGANIZATION AND GROWTH STRATEGY

Sadaf Rehman (Student Author)
Ghufran Ahmad (Faculty Supervisor)

Case Objectives and Use

The case may be used in the graduate/MBA or executive courses on the management of social enterprises and on education management in developing economies. The objectives are:

- Evaluation of the challenges that a large scale society faces while meeting its educational needs.
- Evaluation of the role of social enterprises in providing formal school-based education at low cost.
- Evaluation of the management model of TCF in terms of its success and efficacy in providing formal school-based education.
- Application of different strategic management frameworks, such as 7S model and strategic HRM framework in evaluating the strategy and operations of a social enterprise.
- Deciding upon the future strategy and course of action of TCF and evaluating the ability of TCF to meet its future objectives and societal needs.

Synopsis

In 2015 Pakistan had the world's second largest out-of-school population. Public and private schools generally offered poor quality education. Founded in 1995, The Citizens Foundation (TCF) is one of Pakistan's leading nonprofits in low cost formal education. TCF introduced innovations to the typical schooling model that facilitated high enrollment, especially for girls, and student learning outcomes were better than national averages. TCF core values were compassion and humility, which drove its expansion and growth to reach the poor. TCF has won several global and local awards.

TCF developed a new ambitious goal of enrolling 1,500,000 children, aiming to scale up the existing student body 10 times in a cost effective manner. The Strategic Development Unit at TCF identified three areas for expansion: a) partnerships with the Government to run its nonperforming schools, b) training programs for low cost private schools, c) a literacy and life skills program for vast population of Pakistani young adults who had never been to school. TCF faced numerous risks such as the fact that TCF had remained apolitical so far, would the Government partnership be sustained beyond the frequent political regime changes? Would the small scale low cost private school owners be able to afford to pay for teacher training, which would not have any visible impact on the school in the eyes of the parents? Would a literacy and life skills program be too distant from TCF core expertise of formal schooling? Would TCF be able to build on its strong track record of growth, or would it need to jettison its historical baggage and create a new design and culture to meet this new challenge? In doing so, would TCF really meet the greatest social need of the low cost education market in Pakistan?

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Ghufran Ahmad, Assistant Professor, Lahore University of Management Sciences, Sector U, DHA, Lahore, Pakistan, +92-42-35608032, ghufran.ahmad@lums.edu.pk

DELTA PLASTICS OF THE SOUTH:
CONSERVING WATER IN THE DELTA.

David Graham Hyatt, University of Arkansas

Case Objectives and Use

These cases were written for the introductory lecture in a three-hour class on cross-sector partnerships for sustainability. Case A sets up the problem and asks students to propose and evaluate options for Delta Plastics regarding the adoption of Pipe Planner within its core market in the delta. Case B reports on the solution they adopted, which was to collaborate with key stakeholders to reduce irrigation withdrawals from the aquifers by 20 percent by 2020. Case B (optional) allows the instructor to return to Case A and introduce the concepts of sustainability and of multi-stakeholder initiatives (MSIs) for sustainability, public and private goods, and the tragedy of the commons. Analysis of the cases together suggests that the problem of the aquifer depletion is central and that while Pipe Planner is a powerful tool in ameliorating the situation, the MSI will need to adapt broader strategies. The objectives are:

- Describe the problem of Delta Plastics with regard to Pipe Planner. (Case A)
- Evaluate risks Delta Plastics faces in the future with regard to irrigation technology. (Case A)
- Recommend and justify possible options for Delta Plastics. (Case A)
- Recognize the problem of withdrawals from groundwater sources as one of collective action. (Case B)
- Differentiate between public and private goods. (Case B)
- Describe the rationale for firms to engage in multi-stakeholder initiatives. (Case B)
- Analyze a problem from the context of the tragedy of the commons. (Case B)

Synopsis

This case centers on the owner and CEO of Delta Plastics of the South, Dhu Thompson and Sean Whitely, as they evaluate the future of a new product, Pipe Planner. Pipe Planner helped farmers who used plastic tubing to irrigate row crops in the delta region of Missouri, Arkansas, Mississippi and Louisiana, the core market for Delta Plastics' main product, Polytube. Pipe Planner helped farmers by calculating the size of pipe needed, how to punch holes in the pipe and how long to irrigate. lowering costs of irrigating by up to 25 percent as well as conserving water use by 25 to 50 percent.

Twenty-five to 50 feet below this rich farming area was the Mississippi River Valley Alluvial Aquifer, 25 to 75-feet in depth, which farmers drew upon to water their crops. Overall, water levels had long been dropping in the alluvial aquifer and withdrawals for irrigation continued to exceed the aquifer's recharge rate by over 5 million gallons per day. Delta Plastics had invested over $2 million in developing Pipe Planner to help with this problem. Company leadership was sure that the product would have a strong market, but the uptake by famers was not meeting expectations. Despite the potential savings, farmers did not like the idea of paying for Pipe Planner as well as Polytube. Further, farmers in the delta were generally reluctant to change.

The author developed this case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note were anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: David G. Hyatt, Business Building 475, University of Arkansas, Fayetteville, Arkansas, 72701, -479-790-3639, dhyatt@uark.edu.

KORCZAK ZIOLKOWSKI: THE CRAZY MAN ON CRAZY HORSE

Jeffrey P. Wehrung, Black Hills State University

Case Objectives and Use

This case is relevant for both general management and MBA courses, with particular relevance to courses discussing social entrepreneurship. Case objectives are:

1. Discuss social motivations for entrepreneurship
2. Consider how celebrity may be at odds with social perceptions of an organization.
3. Discuss the role of task and relationship conflict on decision-making, partnership continuance, organizational commitment, and organizational task performance.
4. Reflect upon students' own psychological safety when discussing sensitive topics such as race, privilege, and social disparity.

Synopsis

Korczak Ziolkowski was already a well-known artist from Boston when, in 1939, he received a letter from Chief Henry Standing Bear stating, "A number of my fellow chiefs and I are interested in finding some sculptor who can carve a head of an Indian Chief who was killed many years ago. We do not believe Borglum [the artist for Mount Rushmore] is the only living man that can do that kind of work." Little did either man know that this request would lead to construction of the world's largest sculpture, as well as a museum, cultural center, university, and medical training center.

The case discussion focuses on the different goals held by Ziolkowski and Standing Bear. While Standing Bear had proposed the project in order to honor his relative Crazy Horse, Ziolkowski grew to view the project as a way to spread awareness of native culture and the means to help future native people through the development of a university and medical training center. Ziolkowski had sacrificed his career and previous life to complete the project, and Standing Bear's waning commitment quickly led to conflict between the

This case study also introduces celebrity as both a strategic decision and potential roadblock for this type of social project. With the ultimate decision to remove Standing Bear from the project, as presented in the epilogue, Korczak risked facing increased criticism regarding his perceived motivations for building the memorial. Ziolkowski had to balance the need for his celebrity to attract tourists, and the social criticism related to his prominence on this project. The case provides an additional benefit in allowing students to consider their own views regarding a variety of social issues and their own difficulty when discussing sensitive issues around race, privilege, and social disparity.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Jeffrey P. Wehrung, Black Hills State University, 1200 University St. Spearfish, SD 57799, 605-642-6398, Jeffrey.Wehrung@bhsu.edu.

STRATEGY AND POLICY

Chair: Gina Grandy, University of Regina
Gina.grandy@uregina.ca

Co-Chair: Karin Schnarr, Wilfrid Laurier University
kschnarr@wlu.ca

MYSORE GHEE STORE:
EXPANSION STRATEGY FOR CLARIFIED BUTTER BUSINESS

Sivakumar Alur, VIT University Vellore India
Durga Prasad M, TAPMI Manipal India
Sulagna Mukherjee, TAPMI Manipal India
Srinivasa Rangan, Babson College USA

Case Objectives and Use

This case can be used in undergraduate, graduate, and executive education programs. It is best suited for a strategy or an entrepreneurship course but it can also be used at marketing course. The integrated marketing communication course as a marketing elective would also be an ideal vehicle for the use of this case.

The objectives are:

1. To apply Porter's Five Forces Analysis to India's ghee industry
2. To critically evaluate the current strategy of a firm in the context of the industry
3. To analyze and evaluate the strategic options in front of the company
4. To assess strategy execution
5. To analyze the various components of product positioning in B2B and B2C markets
6. To discuss communication options for the fast moving consumer goods (FMCG) market
7. To apply the 5M model of marketing communication in a FMCG context

Synopsis

Mysore Ghee Store (MGS) produced and marketed ghee (clarified butter) in the city of Hyderabad in India. Most of its ghee sales were B2B to businesses like restaurants and sweetmeat makers that used it for food preparation. Decreasing B2B market margins and increased packed ghee sales to end users through the retail market prompted Satish Kumar, MGS's current owner, to enter the B2C market. He tied up with More (pronounced 'moray'), a national retail chain for supplying packed ghee in October 2013. MGS's packed ghee was also made available across multiple retail channels ranging from independent mom and pop stores to regional/local chains' retail outlets and e-retailers. Packed MGS ghee sales through the various retail channels were somewhat encouraging. In April 2014, MGS was looking at two sets of issues. The first was how to proceed with the brand building driven marketing communication effort. The second was to rethink the strategic options in front of MGS and assess the need for and viability of a new strategic direction for the company.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Professor U. Srinivasa Rangan, Luksic Chair Professor of Strategy and Global Studies, Babson College, Babson Park, MA 02457, +1.781.239.4237, rangan@babson.edu.

PAINTING THE FUTURE:
AMIPAINT NANOMATERIALS AND THE SAFER-BY-DESIGN APPROACH FOR NEW MARKETS

Claire Auplat, Novancia Business School
Camille de Garidel-Thoron, SERENADE Labex

Case Objectives and Use

The case is targeted for MBA or executive MBA students, for Ms students, and also for seminars or Summer Schools for Doctoral students. It may be used to familiarize management or business students with the challenges of developing nano-based products in an SME. It may also be used in schools of engineering or life sciences to bring together innovation and management issues.

It can be used in classes on strategic management, innovation management, sustainable development, or entrepreneurship and business development. The case does not necessitate specific scientific prerequisites.

The objectives are:

- Introduce the Safer-By-Design approach in management. The Safer-By-Design approach is supported by joined efforts of the EU, OECD, COR, EU-USA.
- Learn how to apply this theory to the development of nanomaterials
- Explore the management challenges that SMEs need to meet to develop a competitive advantage with nano-based products.

Synopsis

This disguised case has been written with a real company to represent an actual situation in the 2016-2018 time frame. Students are placed in the position of the Chief Executive Officer of an international SME manufacturing decorative paints who is considering whether to develop a new line of products based on nanostructured materials. These new materials could give his company a competitive advantage thanks to their unique properties answering many unmet customer needs. However, bringing these new paints to the market involves important strategic choices. The case addresses the elements to take into account to develop nano-based products, especially in the industry of paints and coatings: investment, compliance, internationalization strategy, assessment of costs and benefits. It follows the Safer-By-Design approach, which integrates sustainability into corporate strategy.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person Camille de Garidel-Thoron, SERENADE LABEX, Technopôle de l'Arbois, Avenue Louis Philibert BP 80 13545 Aix-en-Provence Cedex 04, France, 00 33 4 4260 6230, cgaridel@cerege.fr.

ACCELE BIOPHARMA:
THE ROLE OF ACCELERATORS IN THE PHARMACEUTICAL INDUSTRY

J. Lee Brown and Kathleen Gurley
Fayetteville State University

Case Objectives and Use

The case can be used in an undergraduate upper-level strategy course or strategic entrepreneurship or a graduate course in strategy. The objectives are:

- Assess the impact of external forces on the firm and its industry.
- Describe the role of industry dynamics and characteristics on strategic decision-making.
- Identify and assess a firm's resources, capabilities, and competencies and how they contribute to a firm's competitive advantage.

Synopsis

This case is about a biopharmaceutical accelerator founded in 2010 by two senior executives with experience in both large pharmaceutical companies and running biotech start-up companies. The founders were successful in raising capital to start their first venture capital fund which they used to invest in four biotech start-ups. All four start-ups are working in very different disease areas. For example one has developed a drug to help with hearing loss that the DOD is funding. Another of the start-ups has discovered drug candidates that will attack antibiotic resistant bacteria. Biopharmaceutical accelerators are relatively new. They differ from business incubators because they invest in the start-ups and provide operational support, but the degree of support provided varies across accelerators.

The Accele BioPharma accelerators operate in a very virtual network type of organization and Accele BioPharma provides primary strategic and operational management for the startups. The case opens with the two senior executives having a discussion about their biotech start-up companies, while waiting for a flight. As the discussion progresses, the conversation moves from their recent successes to a potential divestment decision. The challenge in this case is to identify where the accelerator adds value, how it balances risks and rewards, and how it improves the start-ups ability to get a drug approved by the FDA.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: J. Lee Brown, Fayetteville State University, 1200 Murchison Road School of Business & Economics, Fayetteville, North Carolia 28301-4252, 910-672-1592, jbrown84@uncfsu.edu.

FITBIT, INC.:
WAS THE COMPANY RUNNING AHEAD OF ITSELF?

Rochelle R. Brunson and Marlene M. Reed
Baylor University

Case Objectives and Use

This case was developed to be used in an undergraduate strategic management course at the point in the course when the discussion of business-level strategy is discussed. The objectives of the case are the following:

- To identify the stage of the product life cycle in which the exercise tracking devices resided in 2016;
- To describe the business-level strategy used by Fitbit;
- To analyze the strengths and weaknesses of Fitbit and the opportunities and threats which would affect the industry;
- To analyze financial trends of Fitbit from 2014 to 2015; and
- To develop a plan for Fitbit for the short and long run.

Synopsis

This case focuses on a dilemma that James Park and Eric Friedman, founders of Fitbit, Inc., faced in the early part of 2016. The company had performed quite well in fiscal year 2015 when net income had increased 33 percent and sales had gone from 5.3 million in 2014 to 8.1 million in 2015. However, analysts were concerned about the future of the company and downgraded their stock in March 2016 after the company had stated that the earnings for the first quarter of 2016 would be lower than originally anticipated because of costs associated with bringing on two new products that year. A concern of the analysts centered around the fact that Fitbit was essentially a one product company and had not moved beyond the present monitoring devices into other fields in which they might compete.

The company had to make a decision about a strategy for the future that might allow them to use the technology they had developed to enter new industries.

The authors developed this case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and instructor's manual were anonymously peer reviewed and accepted by the North American Case Research Association (NACRA) for its annual meeting in October, 2016, in Las Vegas, NV.
Contact person: Rochelle R. Reed, Baylor University, Rochelle_Brunson@baylor.edu

TAKING OVER OPERATIONS OF THE MUSEO ALAMEDA

Douglas H. Carter and Darren W. Spencer (student authors), Muma College of Business, U. of South Florida
Faculty Advisor: Janis L. Gogan, Bentley University

Case Objectives and Use

Instructors can use this case in undergraduate or graduate-level courses in Strategic Management, Museum Management, Education Leadership, Corporate Philanthropy, and/or Urban Renewal classes, with specific focus on Strategy and Busine ss Policy. The situation allows an exploration of the adaptation of business strategy, looking at the relationship between intended and realized strategies, and the influence of emergent strategies. You can also explore Lean Strategy Development theories. For undergraduate courses, this case is best used during the final 1/3 of the semester, while graduate students will benefit from this case during the first 1/3 of the semester.

Synopsis

Dr. Maria Ferrier, the inaugural president of Texas A&M University-San Antonio, is given the opportunity to assume operations of a failed Latin history museum 12 miles from her campus. This museum was the first Smithsonian museum outside of Washington D.C., but encountered rising costs and low attendance leading to financial failure. The City of San Antonio offered management of the Museo Alameda to Dr. Ferrier and A&M-San Antonio in an attempt to keep the building occupied and utilized for cultural purposes, but without a fine arts department and no museum management experience among any of the faculty members, this was an awkward strategic fit. Dr. Ferrier saw past this, recognized the opportunity, but needed to convince her leadership to support the project. This case covers the business case issues she addressed with her Chancellor and Board of Regents while attempting to gain their support.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Darren W. Spencer, University of South Florida, 4202 E. Fowler Avenue, Tampa, FL 33620, USA, dwspencer@mail.usf.edu.

STEP BY STEP:
WILL FITBIT ACTIVELY MAINTAIN ITS MARKET LEAD?

Felipe da Silva, University of Nebraska Omaha
Faculty Advisor: Dr. Erin Bass, University of Nebraska Omaha

Case Objectives and Use

This case was developed to be used in undergraduate- and MBA-level courses that present core curriculum in strategy. The case was designed to with two major foci related to business-level strategy and competitive positioning. First, the case illustrates the difficulty of differentiating based on innovation. Second, the case demonstrates how the lack of a well-defined business-level strategy can impact the business. Arguably, Fitbit offers a product for everyone, and thus, has not effectively made choices of what to (and not to) offer. In doing so, it has become vulnerable to its competition that has more clearly defined business-level strategies.

Synopsis

The case illustrates several issues confronting companies in the fast-evolved technological world; highlighting the difficulties in differentiating by constantly attempting to create "the next big thing". More specifically, the case evaluates the current market situation and challenges faced by Fitbit. Fitbit is a technology company, founded in San Francisco, California, offering wireless health and fitness wearable trackers that measures people's activities data throughout the day. Fitbit's products capture data such as steps taken, calories burned, sleep quality, and more.

The focus of the case is on the increased competition in this industry from technological companies such as the powerful Apple and Samsung to the China-based Xiaomi, fitness incumbents such as UnderArmour, and GPS and mapping companies such as Garmin. Competitors are squeezing both ends of the market—some offering high-end devices (such as Apple's "Apple Watch" and Samsung's "Gear") while others offer inexpensive ones (Xiaomi's fitness tracker retails at just $11 USD). The stiff competition in this market space is raising several questions for investors about Fitbit's future. These concerns only mounted after Fitbit launched its newest product, the Fitbit Blaze. With investors' patience ceasing, one question remains unanswered: What is Fitbit's strategy for moving forward?

The case takes place at the time when Fitbit launched the Fitbit Blaze, and, as a short case, focuses on competitive dynamics. The case describes Fitbit's background, it's extensive product line, and its target markets. The case also illustrates how the industry has broken into three segments: Sports/High Performance devices, Fitness Trackers, and Smart Watches. A unique facet of the case is that it highlights how these segments are becoming increasingly overlapped—where, for example, the Samsung Gear operates both as a fitness tracker and a smart watch, and UnderArmour's device is both a fitness tracker and a Sports/High Performance device. The case presents Fitbit to be operating in the crossover of all three segments, but, as exemplified graphically in Figure 2, in operating in this marketspace, Fitbit is being squeezed from all three sides of its competition. This case exposes the challenges for a successful company to keep themselves competitive by comparing the products' offerings, analyzing the competitors' strategies, and analyzing market trends and future opportunities.

The author developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Felipe da Silva, University of Nebraska Omaha, 6001 Dodge Street, (402) 541 5756, fdasilva@unomaha.edu.

CARRERAS CIGARETTE COMPANY: QUO VADIS?

Michael Nicholson and Atherine Lee
University of Technology, Jamaca

Case Objectives and Use

This case is intended to show the changing fashions in tobacco use over time, and one company's efforts at maintaining a fit between its products and the changing market preferences. The case can be used by students of undergraduate Strategic Management and Marketing Courses. The objectives are:

- Explore areas such as External and Internal Business Environments and how a thorough understanding of each can impart comparative advantage in a competitive environment.
- Review Mergers and Acquisitions and how they can help a company to grow rapidly and to acquire particular competences quickly.
- Analyze management's vision and strategic decisions.
- Explore Innovation and its role in company transformation

Synopsis

Carreras Cigarette Co. has had a long history in tobacco products. From its earliest beginnings in the 18th century, the company's development, in many respects, paralleled the changing fashions in smoking as one favoured method of tobacco use sequentially gave way to others. It was a major participant in the movement from cigars and pipes, through snuff and proprietary tobacco blends, and a leader in the development of filtered and machine-made cigarettes. Over its long history, it has had several ownership changes, and, even now, exists as a part of British American Tobacco (BAT). This case touches on the events which prompted the development and eventual dominance of cigarettes as the preferred vehicle of tobacco use internationally.

The case culminates in an overview of its history in Jamaica, from its registration as a Jamaican company in 1961 and manufacturing its own products to 2014, by which time it had ceased manufacturing in Jamaica and was a marketer of cigarettes. The change in social attitudes to tobacco use is also covered, from the early days when it was fashionable to be a smoker up to the time when awareness of its public health hazards became widespread, and governments imposed sanctions on tobacco products.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Michael Nicholson , University of Technology, Jamaica, 237 Old Hope Road Kingston Kingston 6, Jamaica,T: 876-361-4590, kovsky54@yahoo.com.

IMPLEMENTING SMART CITY VISION IN INDIA: SOLAPUR

Ajit Patil
IBS Business School, Hiranandani Complex, Powai, Mumbai, India

Case Objectives and Use

This case can be discussed in different subjects taught in a B-school. These subjects can be Marketing, Strategy, and Government policy. The case has multi-fold teaching objectives. The teaching objectives may differ on the basis of the subject under which the case study is discussed.

- **Marketing:** The case aims to develop an understanding of the Macro-Environmental analysis which is required before formulating a strategy. The case study depicts how socio-political, cultural and economic problems create challenges for urban development. It also discusses how to go about implementing a Vision Statement.
- **Strategy:** The teaching objectives which can be covered under this subject are: Environmental Scanning, Vision and Mission, Strategy and vision implementation, Project financing
- **Government Policy:** The teaching objective is to cover the following topics: Smart City, Urban Planning, Urban Development, and Sustainability.

Synopsis

In 2015, immediately after a change in the central government, India started working on a 'Smart City' project to handle large-scale urbanization and improve quality of life through technology. Local bodies could use Smart City development to increase the efficiency of services offered and reduce expenses. Supriya, Deputy Commissioner of Solapur Municipal Corporation (SMC), worked with citizens to formulate a vision statement, and Solapur was shortlisted among 20 cities to be considered for a Smart City Development Project, in the first round. The government of India wanted to execute the project through a quasi- government body, called 'Special Purpose Vehicle' (SPV), to take care of implementation of Smart City projects. SPV would operate like a corporate body with a Chief Executive Officer (CEO) heading the team. Developing consensus on vision involved trade-offs and costs, and the vision statements were subject to multiple interpretations.

There were many challenges in implementing the Smart City project in Solapur. Some problems were institutional, some political, some financial, some administrative/managerial and some behavioral. For example, SMC encroached areas where they did not have legitimate governing powers. The subjects were beyond the scope of local bodies. The central government wanted to keep Municipal Corporation away to avoid local politics and corruption. It was important to redefine the role of Solapur Municipal Corporation (SMC). How to take care of overlaps in authorities and responsibilities of the SPV and SMC was the primary issue.

Accelerated implementation of the Smart City project would be a real challenge in the democratic set up where litigations and local politics could slow down the pace of work. The legal, political and bureaucratic structures in democratic India tend to escalate the total project cost. Corporators of Solapur Municipal Corporation would not agree to share funds without exercising any control on the execution. The problem got worse because different political parties were ruling in the state/province (BJP) and in the Solapur Municipal Corporation (INC and NCP coalition). Developing consensus and a 'political will' was a challenge, as was financing the project.
Supriya actively searched for financing options explored by other Smart cities in the world. The case discusses some methods of project financing in The Netherlands, China, and USA, as well as elsewhere in India.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Ajit Patil, IBS Mumbai, IBS Business School, Hiranandani Complex, Powai, Mumbai, India, +91 9819943643, ajitpatilmumbai@yahoo.co.in.

PLANNING TO ENGAGE THE MILLENNIAL GENERATION AT UNITED WAY SUNCOAST

George H. (Jody) Tompson and Deirdre Dixon
University of Tampa

Case Objectives and Use

This case is designed to be used in a course in non-profit management or in strategic management. It has been class tested with undergraduate students and can be useful in MBA courses, especially with the requirement for outside reading and research. The objectives of the case are

- Understand cross-generational differences for non-profit engagement
- Learn how values influence differences across target markets
- Leverage a marketing strategy to recruit, select, and hire new employees

Synopsis

The information presented in the case was collected from a real non-profit organization in Florida. None of the information has been disguised. Jamie Renee was the Chief Development Officer of United Way Suncoast (UWS), which was the regional chapter of United Way for the four counties of the Tampa Bay region. Jamie was facing a generational dilemma. Her organization had an evidence-based strategic plan in place, was well-regarded in the region, had loyal corporate partners and was managing its budget well. However, her longer-term vison of success was quite cloudy; even threatening. UWS was having much more trouble engaging with Millennials than with any other generations of stakeholders.

Based on research that United Way had conducted, and on other sources, Jamie realized that Millennials had unique patterns of giving and volunteering to charities. Compared to Matures, Baby Boomers, and even to Gen X, Millennials tended to donate relatively *more* time and money to international human rights causes, but they gave *less* to local social service charities. The difference was not significant while Millennials were low wage earners, but if the pattern continued, it could have serious implications for United Way. Each United Way chapter was designed to study and address the needs in its local community. A large portion of revenue in each United Way chapter came from local companies that wanted to resolve local problems. Eventually, Millennials would be wealthier, and some of them would become company leaders. Jamie Renee wanted United Way to become more appealing to Millennials in three capacities: as donors, as volunteers, and as employees. She worried that if she could not increase their interest in local charities soon, their habits might become so strong that they would be hard to change later.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person: Jody Tompson, University of Tampa, Tampa, FL, 33606, 813-257-3284, jtompson@ut.edu.

WEST KENDALL BAPTIST HOSPITAL: MEETING THE DEMAND OF COMMUNITY BASED HEALTHCARE IN THE NEW (AND STORMY) REGULATORY ENVIRONMENT

Miriam F. Weismann, Florida International University
Heather Pierce, West Kendall Baptist Hospital
Javier Hernandez Lichtl, West Kendall Baptist Hospital
Denise Harris, West Kendall Baptist Hospital
Lourdes Boue, West Kendall Baptist Hospital
Cathy Campbell, West Kendall Baptist Hospital

Case Objectives and Use

This case was used for the first time in spring 2016 in the master's capstone course in the Florida International University Healthcare MBA program. The case utilizes the "live case study" method (Klein, 2001) which fosters student involvement in "a real life experience of interactive processes involved in decision making." The events are real, although the financial statements have been adjusted to include hypothetical numbers to protect hospital privacy. The objectives are:\•Assess market opportunities by analyzing consumers, competitors, collaborators, context, and the strengths and weaknesses of an entity

- •Develop quality monitoring and quality improvement processes
- •Evaluate the interdependencies of different stakeholders in shaping policy
- •Evaluate potential costs and benefits and provide insights into the effects of health policy based on qualitative and quantitative analysis
- •Describe the economic factors that influence decision making

Synopsis

The first three years of operation of the West Kendall Baptist Hospital (WKBH) in Miami, Florida provided a "poster child" for efficient and cost effective healthcare delivery to the West Kendall community that it served. The hospital leadership and management team exemplified a quality oriented staff that moved as a cohesive and dedicated organization. WKBH exceeded every budget prediction and showed a profit in year 3, well before expected. Then came the winds of regulatory change. With the passage of the Affordable Care Act and the attendant imposition of new reimbursement metrics, the picture at WKBH changed almost overnight. By the first quarter of 2016, WKBH started to lose money in excess of budget predictions despite its increased patient admissions, careful financial planning, expense reductions, quality service and excellence in patient care delivery. A serious financial crisis was looming with little relief in sight. The hospital management team began to search for solutions.

One solution was to form a learning partnership with the FIU Health Care MBA program and work with students to find the solutions. This case presents that journey. The excitement generated by the formation of a learning partnership between the hospital and the university HCMBA students was palpable from the start. As the case closes, the hospital executives and the students work together to identify and define difficult quantitative and qualitative issues faced by the hospital as a result of major changes in the regulatory environment with the passage of the Affordable Care Act and consider real policy solutions.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2016 Conference, Las Vegas, NV, October 6-8, 2016. Contact person Miriam F. Weismann, Florida International University, 11200 S.W. 8th St., Miami, Florida, 33199, 401-497-9659, mweisman@fiu.edu.