

CASE RESEARCH JOURNAL

**OUTSTANDING TEACHING CASES
GROUNDED IN RESEARCH**

**VIRTUAL ISSUE
MARKETING
2021**

GINA GRANDY, EDITOR

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Outstanding Teaching Cases Grounded in Research

Virtual Issue on Marketing 2021

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NACRA

**NORTH AMERICAN CASE
RESEARCH ASSOCIATION**

Editor

**Gina Grandy
University of Regina**

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The *Case Research Journal* (CRJ) publishes outstanding teaching cases drawn from research in real organizations, dealing with important issues in all administration-related disciplines. The CRJ specializes in decision-focused cases based on original primary research – normally interviews with key decision makers in the organization but substantial quotes from legal proceedings and/or congressional testimony are also acceptable. Secondary research (e.g., journalist accounts, high quality website content, etc.) can be used to supplement primary data as needed and appropriate. Exceptional cases that are analytical or descriptive rather than decision-focused will only be considered when a decision focus is not practical and when there is a clear and important gap in the case literature that the case would fill. Cases based entirely on secondary sources will be considered only in unusual circumstances. The Journal also publishes occasional articles concerning case research, case writing or case teaching. Multi-media cases or case supplements will be accepted for review. Contact the journal editor for instructions.

Previously published cases or articles (except those appearing in Proceedings or workshop presentations) are not eligible for consideration. The Journal does not accept fictional works or composite cases synthesized from author experience.

CASE FORMAT

Cases and articles submitted for review should be single-spaced, with 11.5 point Garamond font and 1" margins. Published cases are typically 8-10 pages long (before exhibits), though more concise cases are encouraged and longer cases may be acceptable for complex situations. All cases should be written in the past tense except for quotations that refer to events contemporaneous with the decision focus.

Figures and tables should be embedded in the text and numbered separately. Exhibits should be grouped at the end of the case. Figures, tables, and exhibits should have a number and title as well as a source. Necessary citations of secondary sources (e.g., quotes, data) should be included as endnotes at the end of the case (not at the end of the IM) in APA format. In the IM, necessary citations (e.g., citations of theoretical work from which the analysis draws) should be included using parenthetical author/year embedded in the text (similar to a traditional academic paper) that feeds into a list of references at the end of the IM. Note that the CRJ approaches citations differently in the case and the IM given the differing audiences for which each document is developed (i.e., the case is written for the student while the IM is written for the instructor). In some rare instances, footnotes may be used in the case for short explanations when including these explanations in the body of the text would significantly disrupt the flow of the case, but generally the use of footnotes in the case should be avoided if possible.

The following notice should appear at the bottom of the first page of the manuscript: Review copy for use of the *Case Research Journal*. Not for reproduction or distribution. Dated (date of submission). Acknowledgements can be included in a first page footnote after the case is accepted for publication, and should mention any prior conference presentation of the case.

It is the author(s)'s responsibility to ensure that they have permission to publish material contained in the case. To verify acceptance of this responsibility, include the following paragraph on a separate page at the beginning of the submission:

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INSTRUCTOR'S MANUAL

Cases must be accompanied by a comprehensive *Instructor's Manual* that includes the following elements:

1. **Case Synopsis:** A brief (three-quarters of a page maximum) synopsis of the case.
2. **Intended Courses:** Identification of the intended course(s) that the case was written for, including the case's position within the course. Please also indicate whether the case was developed for an undergraduate or graduate student audience.
3. **Learning Objectives:** The specific learning objectives that the case was designed to achieve. For more details on learning objectives, see the article titled "Writing Effective Learning Objectives" at the useful articles link.
4. **Research Methods:** A Research Methods section that discloses the research basis for gathering the case information, including any relationship between case authors and the organization, or how access to case data was obtained. Include a description of any disguises imposed and their extent. Authors should disclose the relationship between this case and any other cases or articles published about this organization by these authors without revealing the author's identity during the review process. If the case has been test taught and this has influenced the development of the case, this should be noted. This section should also indicate who in the organization has reviewed the case for content and presentation and has authorized the authors to publish it (note that this last component is not necessary for cases based on congressional or legal testimonies).
5. **Theoretical Linkages:** In this section please provide a brief overview of the theoretical concepts and frameworks that will ground the analysis/discussion of the case situation in theory and research. Please include associated readings or theoretical material that instructors might assign to students or draw on to relate the case to their field or to the course. In developing this section, recognize that business courses are often taught by adjunct faculty who are business professionals who may not be steeped in the theory of the discipline the way an active researcher might be. Develop this section with the intent of helping that type of instructor effectively apply and teach these theories/frameworks.
6. **Suggested Teaching Approaches:** Suggested teaching approaches or a teaching plan, including the expected flow of discussion with an accompanying board plan. Include a description of any role plays, debates, use of audiovisuals or in-class handouts, youtube videos, etc. that might be used to enhance the teaching of the case. Authors are strongly encouraged to classroom test a case before submission so that experience in teaching the case can be discussed in the *IM*. Authors are discouraged from including websites as integral resources for the teaching plan because websites are not static and the content of the website link may change between the writing of the case and an instructor's subsequent use of the case. This should also include a section on how best to teach the case online / remotely.
7. **Discussion Questions:** A set of assignment/discussion questions (typically three to ten depending on discipline) that can be provided to students to organize and guide their preparation of the case. For most cases, either the final or the penultimate question will ask students for their recommendation on the overarching decision facing the decision maker in the case along with their rationale for that recommendation.
8. **Analysis & Responses to Discussion Questions:** This section of the IM represents the core of the case analysis. Repeat each assignment/discussion question, and then present a full analysis of that question that demonstrates application of relevant theory to the case. Note that the analysis in this section should go beyond what a good student might present as an 'answer' to the question. Write to the instructor with an eye toward helping him or her understand in detail how the theory applies to the case scenario, how discussion of this particular question might be approached with students, where the limitations in the theory might be relative to the case scenario, and how the analysis contributes to the building of an integrated recommendation regarding the decision the case protagonist must make.
9. **Epilogue:** If appropriate, an epilogue or follow-up information about the decision actually made and the outcomes that were realized as a result of the decision made.
10. **References:** Provide full citations (in APA format) for all references that were cited in the Instructor's Manual.

REVIEW PROCESS

All manuscripts (both the case and the instructor's manual) are double-blind refereed by Editorial Board members and ad hoc reviewers in the appropriate discipline. Most submissions require at least one round of revision before acceptance and it is common for accepted cases to go through two or more rounds of revisions. The target time frame from submission to author feedback for each version is 60 days.

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Submit the case manuscript and Instructor's Manual in one document via the *Case Research Journal*/ScholarOne website at <http://mc.manuscriptcentral.com/nacra-crj>. This site provides step by step instructions for uploading your case. You will also be provided the opportunity to upload two case supplements – this is to allow submission of a spreadsheet supplement for the student and for the instructor if needed. No identification of authors or their institutions should appear on either the main case/IM document or on the spreadsheets. All identifying information should be removed from the file properties before submission. If you have audiovisual content to your case, please contact the editor to determine the best way to make this content available to reviewers without revealing the authors' identities.

At least one author must be a member of the North American Case Research Association. Membership dues are included in annual registration for the NACRA conference, or may be paid separately through the main NACRA website.

For questions, contact:

Gina Grandy, Editor

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From the Editor

Welcome to the Virtual Issue on Marketing cases (Abstracts Only) of the *Case Research Journal*. In this virtual issue of *Case Research Journal* you will find 23 cases in the area of Marketing published over the past number of years. The intent of the virtual issue is to create a resource for those who teach in the area of Marketing – in effect a toolkit at your fingertips so that your search for excellent marketing cases is easy.

This Virtual Issue includes very recent Marketing cases, including those published just last year from Volume 40, as well as some of the recent and former Best Selling cases in this area. The 23 cases span a broad range of decisions, industries, sectors, and countries.

The cases are presented in order of publication starting with the most recent. The content in this Abstracts Only file provides an extended abstract of the case so that you have what you need in making your decisions about cases fitting for the next delivery of your Marketing course.

I would also like to remind you of two forthcoming special issues. *CRJ* is hosting a special issue on **Short Cases** with submissions due January 31, 2021. Later in 2021 we are hosting a special issue on **Secondary Data** cases with submissions due May 31, 2021. Check out the *CRJ* website for the call for cases for the special issues.

Sincerely

Gina Grandy, Editor
Case Research Journal

Virtual Marketing Issue: Abstracts Only

VOLUME 40, ISSUE 4

- **Marketing** **BEWÖÖD – An Entrepreneur’s Pricing Question**
- *Pricing*
- *Quantitative Analysis* Eric Dolansky, * Brock University, Sabine Ruaud and Herve Didier, EDHEC Business School, [1812 Sir Isaac Brock Way, St. Catharines, Ontario, Canada, L2S 3A1, edolansky@brocku.ca]
- *Entrepreneurship*

Created in 2015, BEWÖÖD was a sustainable fashion brand start-up in Lille, France that sold a range of products with wood as their primary component. The company’s best-selling product was a wooden bow tie named “Mr. Divergent.” In March 2018, Laury Bonjean, founder and owner of BEWÖÖD, had four options for growth available to her and had to decide which of these to act on and, most importantly, how to price them. She was considering offering two new products (a Father’s Day box set and a subscription box) and had two new channel opportunities (a trendy shop wanted to sell her products and a pop-up store had invited her to participate). While these began as product and distribution decisions, Bonjean felt that pricing formed a huge part of the strategizing. Using qualitative and quantitative information she needed to decide how to proceed and needed to do so very soon.

Intended Courses & Levels

This case is recommended for graduate and advanced undergraduate business students enrolled in a marketing or pricing strategy course. This case aims to show that price is a singular variable that combines high tangibility and very rational measures with perceptual effects. As such, pricing decisions mobilize multiple marketing research concepts, with varying degrees of difficulty. It also presents different approaches to pricing a product, ranging from an accounting perspective (e.g. costs, desired margin, breakeven point) to a more customer or market-focused perspective (e.g. psychology, elasticity, value).

Learning Objectives

Though the context is an entrepreneurial one the learning goals and focus of the case are squarely on marketing and pricing, not specifically start-up challenges. Those learning objectives are as follows, listed in order of how they are covered in the analysis:

- Learn the importance of strategic and tactic decision-making in a start-up company;
- Assess pricing performance;
- Demonstrate understanding of how pricing fits within the marketing plan;
- Analyze pricing decisions based on quantitative and qualitative analysis;
- Incorporate pricing information and analysis in a strategic decision.

VOLUME 40, ISSUE 1

- **Marketing**
- *Marketing Channels*
- *Marketing Channels Development*
- *B2B Marketing*
- *Growth Strategy*
- *Online Alliances*

AlloVoisins.com: Good Neighbours Need Good Partners

Catherine M. Lejealle,* ISC Paris and Eric Dolansky, Brock University [22 boulevard du Fort de Vaux 75017 Paris, France, clejealle@iscparis.com]

The sharing economy web platform AlloVoisins allowed people within communities to post needs (e.g. babysitting, borrowing tools, house checking, etc.) for other members to fulfill for a mutually agreed upon fee. Even though 2018 enrolment goals were met seven months ahead of schedule, Edouard Dumortier, CEO, was worried. A large new competitor was entering the market. To help grow Allovoisins quickly Dumortier planned a Business-to-Business-to-Consumer (B2B2C) strategy to drive enrolment and created a list of potential partners. In order to maximize AlloVoisins' opportunities, partners would need to provide access to the largest database of customers possible but also fit well with the value offered by AlloVoisins. Assessing a match between Allo Voisins and potential partners needed to be done. The question, though, involved selecting partners from a list he came up with after some research to best achieve his goals.

Intended Courses & Levels

The case is suited for use in an introductory marketing course, specifically those parts of the course having to do with segmentation, growth, channels, partnership, collaboration, or digital marketing. The same decision (finding a suitable B2B2C partner) fits with any of these topics, but different aspects may be stressed.

The case puts the student in the role of the decision maker and provides the opportunity to assess B2B2C as a growth solution and to make decisions about who to partner with to best benefit AlloVoisins. The case also allows for discussions around brand awareness, consumer behaviour, growth, B2B relationships, sharing economy and distribution in general.

Learning Objectives

- Understand the nature of growth strategies in the sharing economy;
- Examine the value of B2B2C strategies;
- Evaluate, from multiple perspectives, the suitability of collaborative arrangements; and
- Identify criteria to assess the value of partnerships within the use of B2B2C strategies, and use these to develop a specific recommendation regarding partners.

VOLUME 39, ISSUE 3

- *Marketing*
- *Brand Positioning*
- *Integrated Marketing*
- *Sponsorship*

Brita's Stephen Curry Sponsorship Splash

Michael M. Goldman* and Maximillian M. Duran, University of San Francisco [101 Howard St, San Francisco, California 94105, mmgoldman@usfca.edu]

Brita's Stephen Curry sponsorship splash is set in the U.S. water filtration industry in the first nine months of 2016. The case documents the initial period of market-leader Brita's sponsorship of the NBA's Golden State Warriors' highly-awarded point guard Stephen Curry. Although the announcement of the sponsorship deal had generated substantial and positive media reaction, sales of Brita products were still declining nine months into the period of the sponsorship deal, after several years of sluggish growth. The case documents the communication activities related to the Curry sponsorship undertaken by Brita's Director of Marketing, Tad Kittredge, during 2016. Given the pressure to deliver weekly sales and the regular NBA season scheduled to begin in just three weeks' time, Kittredge needed to find a way to use the Curry sponsorship to contribute to a sales turnaround in the coming months. The case offers four strategic alternatives that Kittredge was considering in October 2016 to change the way Brita used Curry.

Intended Courses & Levels

The case is best suited to an undergraduate marketing course in brand communication or sponsorship, where the focus is on the assessment of the four strategic alternatives Kittredge was considering to invest in and leverage the sponsorship.

Learning Objectives

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

- Describe the role of indirect competition in the analysis of the competitive context;
- Analyze the brand positioning of a consumer brand;
- Critique the sponsorship brand fit between an athlete and consumer brand; and
- Critically assess strategic sponsorship alternatives and argue for a recommended course of action.

VOLUME 39, ISSUE 3

- *Marketing*
- *Green Retailing*
- *Product Disposition Decision*
- *Safe Food Waste*

Meat the Needs: Giant Foods' Meat Rescue Program

Darrell E. Bartholomew*, Peter F. Swan, Maggie M. Mehalko and Richard R. Young, Penn State Harrisburg [777 W. Harrisburg Pike, Middletown, PA 17057-4898, deb62@psu.edu]

- *Social Responsibility*
- *Sustainability*
- *Triple Bottom Line*
- *Zero-Waste*

This case is complemented with video components throughout the written narrative. The decision focuses on sustainable green retailing strategies surrounding meat donations by Giant Foods in their meat rescue pilot program called “Meat the Needs.” John MacDonald needs to decide whether to expand or to eliminate the pilot program, now that the Central Pennsylvania Food Bank (CPFB) will no longer be picking up the meat after 2012. Green retailing strategies include opportunities and risks. The opportunities include reducing food waste by increasing food donations; risks include risk to brand, cost, and logistics for safe food handling. Will Giant Foods’ disposition decision fit with the company’s new focus on zero-waste and its desired edict of “Living Here, Giving Here”? Are the risks and costs too much for the future of the program? MacDonald and his team need to work through these important sustainability issues.

Intended Courses & Levels

This video case is for a sustainability course or as a component of a general business or marketing course. The topic of sustainability is touched on in many business and marketing textbooks today. The video case is appropriate for an undergraduate audience. The primary focus of this video case is sustainable green retailing strategies involving opportunities and risks of food donation and food waste reduction.

Learning Objectives

By analyzing this case, students will learn to:

- Assess and discuss green retailing strategies, including zero-waste and the Environmental Protection Agency’s (EPA) Food Recovery Hierarchy.
- Analyze risks to brand and discuss how food safety and logistics can help to lower these risks when donating perishable food products.
- Apply analytical tools, including cost analysis, to green retailing strategies.

VOLUME 39, ISSUE 3

- *Marketing*
- *Market Research*
- *Content Analysis*
- *Voice of the Customer*
- *Entrepreneurial Ventures*

Validate or Pivot?

Using Content Analysis to Assess Green Zebra’s Customer Value Proposition: Case A

Charla Mathwick,* Portland State University [615 SW Harrison St., Portland, OR 97201; mathwickc@pdx.edu]

CEO Lisa Sedlar was two weeks from the start of meetings with venture capital funders to raise \$10 million for a West Coast expansion of her urban, convenience-store startup – Green Zebra Grocery. However, Amazon had just announced plans for a 3,000-store national rollout of Amazon-Go, their high-tech, self-serve concept store, described as the future of c-store retailing. To preempt investor concerns, Sedlar needed evidence that either validated the Green Zebra ‘healthy convenience’

positioning or customer insights that would help her decide how to pivot her customer value proposition to create a differentiated market positioning relative to key c-store competitors.

Intended Courses & Levels

This case is primarily targeted to upper level undergraduate and graduate classes in market research. The case illustrates one of the first steps recommended in the market research process, gathering qualitative insight to capture the ‘voice of the customer’. The strategic decision associated with the case can be addressed, at least preliminarily, based on the content analysis results.

Learning Objectives

After studying this case, students will be able to:

- Understand and apply the basics of exploratory research using content analysis. This research technique has two distinct applications: (1) it is the first step in the market research process, and (2) it is a relevant research technique that underlies the market validation process used by entrepreneurs for purposes of strategic decision-making.
- Apply customer insights to support strategic decision-making related to the formulation and/or revision of a firm’s customer value proposition and competitive advantage.
- Apply exploratory research insights to formulate research objectives used to guide a follow-up primary study.

VOLUME 39, ISSUE 1

- *Marketing Strategy*
- *Positioning*
- *Target Market*
- *Managing Growth*

Snakes & Lattes: Playing the Marketing Strategy Game

Eric Dolansky,* Brock University [1812 Sir Isaac Brock Way, St. Catharines, Ontario, L2S 3A1, edolansky@brocku.ca]

Aaron Slade, CEO of Snakes & Lattes, was tasked with overseeing the ambitious growth plan for the company. Snakes & Lattes was a chain of board game cafés in Toronto; customers could come and play board games, eat, drink, and have a good time. The firm had grown from one small location opened in 2010 to three locations in 2018, each larger than the last, and annual revenue had increased to \$7 million. The company had announced plans to sell franchises in about 20 North American cities and open three more company-owned cafés. The immediate problem that Slade was wrestling with had to do with marketing strategy and communication. With each venue having its own character there was room for more decentralized marketing, but only if it was not to the detriment of the brand. Slade needed a strong marketing plan to complement the growth in locations.

Intended Courses & Levels

This case was designed to be used either at the beginning or end of a general marketing case course, at the graduate or senior undergraduate level. If used early in the course it can introduce a framework and

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

Learning Objectives

The key learning objectives of the case are as follows:

- Discover the link between strategy and tactics in marketing, and stress the importance of fit between them;
- Explore the value of a centralized versus decentralized communications plan;
- Understand the challenges of managing a rapidly-growing business, in terms of marketing consistency and brand identity;
- Learn how meaningful figures can be derived from relatively simple and sparse data.

VOLUME 38, ISSUE 4

- *Marketing*
- *Distribution*
- *Value Chain*
- *Channel Management*

Elzra Corp

Eric Dolansky*, Brock University [500 Glenridge Avenue, St. Catharines, Ontario, Canada L2S 3A1, edolansky@brocku.ca]

In August 2016, Aron West, owner and creative director of board game publisher Elzra, was deciding whether or not to part ways with Impressions, his distributor. West had a hit product with his game Catacombs and its spinoff games and had recently concluded a very successful crowdfunding campaign. West was starting to believe that he was able to move on from Impressions, which specialized in small publishers with few products, and had begun to prepare his company for the a possible split. Elzra and Aron West had experienced some difficulty with which sales Impressions had a legitimate claim to, and their lack of flexibility. On one hand, Impressions was demanding, expensive, and Elzra may have outgrown it. On the other hand, working with Impressions, according to West, made everything easy.

Intended Courses & Levels

This case is designed for either the distribution component of a general marketing course (e.g. Introduction to Marketing, a capstone Marketing Strategy course) or at the beginning of a dedicated distribution or channels course. It is also suitable for both undergraduate and MBA audiences. The primary focus of the case is on distribution, in particular the value added by different members of the distribution chain and distribution channel decision-making. There are qualitative and quantitative components to the case.

Learning Objectives

The key learning objectives for this case are:

- Understanding the value provided by distributors, and the costs they incur;
- Examining the relative value each member of the distribution chain brings;
- Calculating the costs (and/or revenue forgone) when using distributors;
- Incorporating distribution as a component of an overall marketing plan;
- Making distribution decisions and the tradeoffs involved.

VOLUME 38, ISSUE 4

- *Retail Management*
- *Marketing*
- *Consumer Behavior*
- *Nonprofit Management*

Pleasant Ridge Habitat for Humanity Second Chance Home Supply

John J. Lawrence* and Michael McCollough, University of Idaho [College of Business & Economics, 875 Perimeter Drive MS 3161, Moscow, ID 83844-3161, jjl@uidaho.edu]

In the fall of 2016, the Pleasant Ridge Habitat for Humanity Second Chance Home Supply (SCHS) store added an assistant manager and doubled the hours the store was open in an effort to increase sales. The store, which sold donated building materials and some household items, was operated to generate funds for the organization's core mission of building homes for those in need in the local area. In July of 2017, at the end of the organization's fiscal year, the organization's executive director and the store's manager and assistant manager met to review the store's financial performance. To the team's surprise, they discovered that both the store's sales and contribution to the organization had declined over the past year despite being open significantly more hours than in the previous year. Students are placed in the shoes of the store's managers and must wrestle with why sales and contribution have declined and what they should do in response.

Intended Courses & Levels

The case was developed for an undergraduate class in retail management. It could also be used in an introduction to marketing course or in a course on nonprofit management. Within the retail class it may be used to address the core functions of retailers (to provide the right merchandise, at the right place, at the right time, in the right quantities, at the right price) or when discussing inventory management. The case can also be used to explore consumer behavior, which would generally be within the chapter on Customer Buying Behavior in a retail textbook.

Learning Objectives

Students will be puzzled that the extension of hours actually seemed to lead to a drop in sales. The case therefore challenges the assumption that there is a direct relationship between adding hours and sales. Many factors influence sales and rarely does a change in tactics that is not tied to a comprehensive strategy provide the results desired. After studying this case, students will be able to:

- Analyze quantitative data (both sales related data and financial statements) to characterize the operations and performance of a retailer.
- Articulate the core functions of a retailer and use this framework to evaluate the marketing strategy of a retailer.

- Apply the Consumer Buying Behavior model to understand the process that consumers use when choosing a store and use this analysis to diagnose weaknesses in a retail operation.
- Develop an integrated plan to drive sales growth in a retail setting.

VOLUME 38, ISSUE 3

• **Marketing Strategy** **KidZania: Spreading Fun Around the World**

• *Entertainment Marketing*

• *Stakeholder Business Model*

• *International Expansion*

• *Product-Market Expansion*

• *Experiential Marketing*

• *Branding*

• *Franchising*

Andres Terech*, UCLA Anderson, Martha Rivera Pesquera, IPADE Business School, Maria Guadalupe Torres, IPADE Business School, [110 Westwood Plaza, B514 Gold Hall, BOX 951481, Los Angeles, CA 90095-1481, aterech@anderson.ucla.edu]

In 2016, Xavier Lopez Ancona, president and co-founder of KidZania—a Mexican company with 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 the very competitive and dynamic entertainment market. Around the world, the revolutionary and innovative edu-tainment concept developed by KidZania was the most copied. Despite the growth, KidZania corporate revenues began to stagnate in 2012 because of the depreciation of the Mexican currency. Four alternatives were being considered: Growth in number of current parks to continue building scale as a defensive strategy, developing smaller park formats to target 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. Xavier's team needed to recommend the best alternative to pursue to the Board of Directors.

Intended Courses and Levels

This case is appropriate for graduate level courses. It can be used in the core marketing course of an MBA Program or elective courses in Marketing Strategy, Brand Management, or Entertainment Marketing. Advanced undergraduates would be engaged with the topic and although their analysis might not be as sophisticated as graduate students, they would be able to choose and defend one of the alternatives presented. Given the strategic focus of the case, it also works well in Executive Education Programs. This case should be taught to students who understand the basic principles of marketing and strategic competitiveness.

Learning Objectives

The primary goals of the case are:

- To showcase the international expansion of a Mexican brand.
- To illustrate a creative stakeholder business model in the challenging and crowded entertainment industry and assess its sustainability in the long term.
- To analyze the experiential marketing strategy implemented by KidZania and its role in building the brand.
- To evaluate product-market expansion alternatives and make a recommendation to a Board of

Directors.

Additional optional goals are:

- To highlight the role of sponsorship as a promotional tool in a context of diminishing effectiveness of advertising spending.
- To discuss different opportunities for brand extension and assess them, given the changes in consumer behavior, competition landscape, and available company resources.
- To teach brand positioning by uncovering points of parity and difference.

VOLUME 38, ISSUE 2

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| <ul style="list-style-type: none">• <i>Green Marketing</i>• <i>Sustainability</i>• <i>Social Responsibility</i>• <i>Branding</i>• <i>Small Business</i> | <p>Locally Laid Egg Company: No Time for Laying Around</p> <p>Rajiv Vaidyanathan,* University of Minnesota Duluth [1318 Kirby Drive, Duluth MN 55812 rvaidyan@d.umn.edu]</p> |
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The Locally Laid Egg Company, based out of Duluth, Minnesota, was a family-owned business founded by Jason and Lucie Amundsen in 2012, as the first commercial grade, pasture-raised, sustainability-focused egg company in the upper Midwest. Its brand identity was born when Lucie changed the company's rather generic name, "Amundsen Farms," to the sassier and playful "Locally Laid Egg Company," also referred to as LoLa. The name and brand quickly gained recognition utilizing mild innuendo and the tagline "Local Chicks are Better". Committed to sustainable farming, operations, and distribution, LoLa gained the attention of Amish farms in Indiana, Iowa, and Minnesota who were interested in collaborating with the Amundsens. Pursuing the expansions proved successful and introduced LoLa to new markets in Illinois, Indiana, Iowa, and Michigan. On the company's second anniversary, Jason was contacted by an Amish farm in Pennsylvania that also wanted to distribute their eggs in their region using the LoLa brand. Should Jason accept the contract and expand east or maintain the status quo?

Intended Courses and Levels

This case is ideal for an undergraduate or graduate green marketing, socially responsible marketing, or sustainability class. It is designed to stimulate discussion about sustainability, social responsibility, decision making, branding, and psychographic segmentation. This case is an excellent vehicle for demonstrating how the internal environment (such as form of ownership and owners' skills) and external environment (such as social, competitive, and economic factors) can affect growth decisions. The case works well both as a subject for a written report and as the basis for classroom discussion.

Learning Objectives

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

- Explain how social responsibility and green initiatives can provide small businesses with a competitive edge.
- Explain the importance of a segmentation, targeting, and positioning.
- Demonstrate comprehension of the complexity of growth decisions and the factors involved in

choosing a growth strategy.

- Recognize the challenges involved in starting and running a small business.
- Identify when a single business decision (in this case how to respond to a letter about a contract farming opportunity) needs to be thought about and addressed in terms of the longer term strategic issues that it raises.

VOLUME 37, ISSUE 3

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| <ul style="list-style-type: none">• <i>Marketing</i>• <i>Pricing</i>• <i>Consumer Behaviour</i>• <i>Value</i> | The WORKS Gourmet Burger Bistro

Eric Dolansky* and Bruce Miller, Brock University [1812 Sir Isaac Brock Way, St. Catharines, Ontario, Canada, L2S 3A1, edolansky@brocku.ca] |
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In October 2014 Bruce Miller, Chief Marketing and Development Officer and co-owner for The WORKS Gourmet Burger Bistro was considering changes to the structure, level, and presentation of his restaurants' prices. The WORKS was the premiere full-service burger restaurant chain in Ontario and had been the fastest growing full-service restaurant business in Canada in 2013, posting 50% year-over-year growth. In the four years Miller and his partners had owned The WORKS they expanded from five locations in one city to 26 locations across Canada. During that time, however, Miller had not altered prices in any significant way and was facing increasing costs of beef as well as a lack of clarity amongst his target segment as to what The WORKS was and what it offered.

Intended Courses & Levels

This case is best suited to be used early in a course on pricing or in the pricing section of a general marketing course at the undergraduate level. It is designed to introduce many key pricing topics while allowing the instructor flexibility as to which theories or topics he or she wishes to explore in more detail.

Learning Objectives

The learning objectives for this case are as follows:

- Foster understanding of the link between value and price;
- Introduce the topics of value to the customer (VTC) pricing, sharp pricing, fit between positioning, target market, and price;
- Explore the ways that value can be demonstrated to justify price;
- Provide a decision focus to pricing, through the use of a situation where there is a relatively blank slate.

VOLUME 37, ISSUE 3

- ***Services Marketing*** **This is Not What I Saw on HGTV**

- *Service Quality*

- *Customer Satisfaction*

- *Customer Expectations*

- *Customer Relationships*

Mary Dana Laird* and James J. Zboja, The University of Tulsa, and Jeffrey B. Paul, Oklahoma State University [800 South Tucker Drive, Tulsa, Oklahoma 74104-9700, mary-laird@utulsa.edu]

An angry customer with a laundry list of complaints has just stormed into a local home staging company. The owner is unavailable, so her assistant must try to salvage the customer's service experience. Using the gaps model of service quality, the assistant (and students) must recognize service quality issues, explore the imbalance between what was promised and delivered, and attempt to manage a disgruntled customer. Complicating matters, the assistant has been given limited authority and must appease the customer without making her boss look unprofessional.

Intended Courses & Levels

This case was designed for undergraduate marketing students in a services marketing class. While the case also could be used in the principles/fundamentals of marketing class for all business majors, the expectations for depth of discussion would be considerably lower. Underscoring the focus on service quality, customer satisfaction, and the importance of managing customer expectations, students are put in the role of an employee attempting to mend a damaged customer relationship.

Learning Objectives

The following learning objectives are present in this case. Students should be able to develop and defend their recommendations.

- Illustrate an understanding of the gaps model of service quality through its application to a real situation.
- Understand the expectations of customers.
- Critically analyze apparent shortcomings in service quality.
- Apply the service marketing triangle (with an emphasis on the internal marketing component) to a real situation.

VOLUME 37, ISSUE 3

- ***Marketing***

- *Marketing Ethics*

CORE Foods: To Withdraw or Not to Withdraw CORE Meals?

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CORE Foods was faced with the decision of whether or not to withdraw

\$100,000 worth of its main product, CORE Meals, from its distributors and retailers. CORE Meals were meal replacement nutritional bars made from high quality, minimally processed plant-based ingredients with no added preservatives. After the company switched to a new supplier for one of its main ingredient, some customers complained about a spicy after-taste, something that was not evident during the initial product testing. While the after-taste was not a health issue warranting a mandatory product recall, CORE Foods felt it would be a disservice to consumers if they sold something that had a different aftertaste from what they were used to. However, withdrawing the products would come at a high cost to the brand and/or the bottom line. What were the alternatives and what actions should Core Foods take that would be in keeping the company's ethos as well as maintain its financial viability?

Intended Courses & Levels

The case has its best home in a graduate Marketing Strategy class in a section on Marketing and Society (or Marketing Ethics). It can also be used effectively in an undergraduate or graduate course in Business and Society to discuss proactive handling of public relations crises.

Learning Objectives

- Showcase an example of a B-Corp business model in the packaged food industry with a socially responsible mission as part of their DNA.
- Enable students to expand their understanding beyond traditional customer value creation concepts in marketing to such concepts as: “stakeholder marketing”, and “shared values.”
- Apply the expanded stakeholder framework to a marketing decision-making situation and enable students to identify the consequences of such decisions for the different stakeholders.
- Identify the causes and consequences of possible decisions, in particular to withdraw the product from the market. And further highlight the importance of taking proactive steps in such a case.

VOLUME 37, ISSUE 2

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| <ul style="list-style-type: none">• <i>Marketing Metrics</i>• <i>Lean Startup</i>• <i>Customer Lifetime Value</i>• <i>Business Model Canvas</i>• <i>Retail Management</i> | <p>Business Model Innovation at Wildfang</p> <p>Charla Mathwick*, Portland State University [631 SW Harrison Street, Portland, OR 97201-075, mathwickc@pdx.edu]</p> <p>Wildfang, a women's retail startup based on “tomboy style and culture,” was launched online in 2013 using public relations and social media content to attract more than 120,000 community members. Growing at a rate of 250% year-over-year, the team tested proof of concept for a localized tomboy experience to support national expansion. By the summer of 2016, expansion planning was in full swing as the executive team dug into the customer lifetime value analysis (CLV) used to assess two business model designs. CLV results for a private label bricks-and-clicks retail model were being weighed against a pivot to a multisided platform. Risks inherent to each business model had to be assessed to support the</p> |
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recommended expansion strategy.

Intended Courses and Levels

This case is appropriate for core courses in marketing strategy, marketing metrics, retailing, and entrepreneurship at both the graduate and advanced undergraduate level. The case provides an opportunity to link the business model canvas (BMC) with CLV modeling techniques to explore the implications of business model design on strategic decision making. The canvas and CLV analysis serve as templates for scenario testing as students weigh two distinct business model options.

In line with lean start-up methodology, the assumptions driving the business model and CLV assessment need to be prioritized in terms of relative riskiness to the venture (McGrath & MacMillan, 1995), to develop a plan for systematic testing (Blank, 2013).

Learning Objectives

After studying this case, students will be able to:

- Identify the relative strengths of various business model designs by analyzing key business components using the BMC template.
- Apply customer segment-level performance assumptions to analyze business model attractiveness using a CLV modeling approach.
- Synthesize results of the BMC and CLV analysis to identify the risks of the various growth strategies and to develop a recommended strategy for the firm.

VOLUME 37, ISSUE 2

- *Diffusion of Innovation*
- *Non-adoption of innovation*
- *Strategy Implementation*
- *Complementary Products*

Delta Plastics of the South: Product Innovation in a Resistant Market

David G. Hyatt,* University of Arkansas [354 Business Building, 1 University of Arkansas, Fayetteville, AR 72701, dhyatt@uark.edu]

The owner and the CEO of Delta Plastics of the South evaluate the future of a new product, Pipe Planner. Pipe Planner helped farmers who used plastic tubing, or poly-pipe, to irrigate 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, for any particular field, the size of pipe needed, how to punch holes in the pipe and how long to irrigate, lowering the farmer's cost of irrigating by up to 25 percent. Despite these benefits, the uptake by farmers was low with less than 3% market penetration. Thompson and Whiteley must decide if Delta Plastics should continue to invest resources in Pipe Planner, and if so, how to market and encourage use of the Pipe Planner program software by farmers. Students are faced with issues surrounding new product development and the diffusion of innovation.

Intended Courses and Levels

This case is appropriate for core courses in marketing strategy, marketing metrics, retailing, an

entrepreneurship at both the graduate and advanced undergraduate level. The case provides an opportunity to link the business model canvas (BMC) with CLV modeling techniques to explore the implications of business model design on strategic decision making. The canvas and CLV analysis serve as templates for scenario testing as students weigh two distinct business model options.

In line with lean start-up methodology, the assumptions driving the business model and CLV assessment need to be prioritized in terms of relative riskiness to the venture (McGrath & MacMillan, 1995), to develop a plan for systematic testing (Blank, 2013).

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- Apply customer segment-level performance assumptions to analyze business model attractiveness using a CLV modeling approach.
- Synthesize results of the BMC and CLV analysis to identify the risks of the various growth strategies and to develop a recommended strategy for the firm.

VOLUME 36, ISSUE 1

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| <ul style="list-style-type: none"> • Professional Selling • <i>Pre-Call Planning</i> • <i>Information Gathering</i> • <i>Needs Identification</i> • <i>Mapping Buying Center</i> • <i>Uncovering Buying Process</i> • <i>Copying and Printing Industry</i> | <p>Konica Minolta Business Solutions: A Professional Approach to Selling (A), (B) & (C)</p> <p>Prabakar Kothandaraman, Sudha Mani,* William J. Healy, William Paterson University [Cotsakos College of Business, Department of Professional Sales, 1600 Valley Road, Wayne, New Jersey 07470-9906, manis1@wpunj.edu]</p> <p>In Konica Minolta Business Solutions: A Professional Approach to Selling (A), Swanson, fairly new to the position had to draft a plan to gather information and plan his entry into a prospect, New York Consulting Group (NYCG). The case provides background on KMBS and NYCG's purchase history of copying and printing. In the Konica Minolta Business Solutions: A Professional Approach to Selling (B) case, Swanson approaches and meets with various departments at NYCG to understand the needs of the customer. He begins to identify key benefits valued by the customer departments even while attempting to build relationships with executives at NYCG. In the Konica Minolta Business Solutions: A Professional Approach to Selling (C), Swanson, faced with scrutiny from his boss, continues to meet with executives from NYCG. Specifically, he works on identifying the buying center and the buying process as he gets ready to present his plan for meeting NYCG's needs.</p> |
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Intended Courses and Levels

The case is appropriate for use in undergraduate classes focused on:

- Professional selling

- Business-to-business marketing

Learning Objectives

After completing each case, students should be able to:

KMBS(A)

- Form a strong understanding of the company to facilitate the sales process. (Question 1)
- Understand the type of information needed to gather relevant sales intelligence. (Question 2)
- Prepare for the first sales meeting with a prospect. (Question 3)

KMBS(B)

- Understand how to approach a prospect and request the first appointment. (Question 1)
- Understand the advantages and disadvantages of using teams in professional selling. (Question 2)
- Summarize the needs of the customer. (Question 3)
- Plan the next steps during a long sales cycle. (Question 4)

KMBS(C)

- Identify the buying center and update information on customer needs through meetings with various members of the buying organization. (Questions 1, 2, and 3)
- Translate features to specific benefits and develop a value proposition. (Question 4)
- Provide a value proposition to customers. (Question 5)

VOLUME 35, ISSUE 3

- ***Marketing Strategy*** **401 Games**
- *Growth Options*
- *Strategic Fit* Eric Dolansky*, Brock University [500 Glenridge Avenue, St. Catharines, Ontario, Canada L2S 3A1, edolansky@brocku.ca]
- *Rapid Growth*

John Park, the owner of 401 Games in Toronto, was wondering where to take his store in the future. One of his product lines, board games, was in the midst of a massive expansion and he was at the forefront in the Toronto market. This provided many opportunities for him to explore. He could expand into online sales, as had most of his competitors. As for his bricks-and-mortar store, he would have the opportunity in the next year to rent out additional space as the second and third floors of his current building would become available. Were he to rent out that space, he thought he would open a board-game café. Another option open to him was to open more stores in other parts of Toronto, or other cities entirely. In addition to overall strategic options, he also had decisions to make about product, promotion and price.

Intended Courses and Levels

While this is a fairly comprehensive marketing case that touches on many subjects, it is best suited to a marketing strategy course or a capstone marketing course, or a marketing strategy session or unit within a course. The key management decision in the case involves selecting from a set of strategic options for growth. These options range from very large initiatives (e.g. geographic expansion, opening a café) to

relatively smaller-scale changes (e.g. greater use of social media).

Learning Objectives

The Learning Objectives of this case are as follows:

- Comprehensively evaluating a business's marketing strategy and tactics;
- Determining how to select viable growth options for a small business;
- Understanding the challenges and opportunities presented by rapid category growth;
- Managing the strategic fit of existing business elements with new growth initiatives;
- Organizing and understanding different options and alternatives, and determining rate of change and its effect on decision-making.

VOLUME 35, ISSUE 2

- *Marketing*
- *Brand Community*
- *Family Business*
- *Small Business*

Motor Trike: Building a Brand Community

John J. Cater,*Brent Beal, Jim Tarter, and Krist Swimberghe, University of Texas at Tyler [3900 University Blvd, Tyler, Texas 70310, jcater@uttyler.edu]

Founded in 1994, Motor Trike, Inc. produced kits that transformed a motorcycle into a three-wheeled vehicle or trike, providing increased safety and comfort for the riders. Trikes became increasingly more popular as the baby boomer generation aged. Jacquelyn Moore, marketing director at Motor Trike, faced decisions of whether to start an owners' group or brand community for the company and then, if so, how to start the group. Jacquelyn had marketing survey data available to help guide the decision making process, but the data needed to be properly analyzed and presented to the owners of the company.

Intended Courses & Levels

This case is appropriate for the following courses:

- Consumer Behavior (undergraduate)
- Branding (undergraduate)
- Marketing Research (undergraduate)
- Strategic Management (undergraduate and graduate)
- Promotional Strategy and/or Digital Marketing (undergraduate)

The case's focus on brand communities and emphasis on the interpretation of consumer survey data make it appropriate for courses in consumer behavior (undergraduate), branding (undergraduate), and marketing research (undergraduate). In marketing courses, this case should be introduced after students have a basic grasp of market segmentation and in conjunction (if possible) with other material on customer groups and brand communities. In strategic management courses, the case should be introduced after students are comfortable with the basic concepts of strategic positioning, differentiation, and competitive advantage.

Learning Objectives

After reading and analyzing the case, students will be able to:

- Describe the basic features of the motorcycle industry, the trike segment, and the unique aspects of the Motor Trike Company. [Competence: Knowledge and Comprehension]
- Describe some of the potential benefits of starting a brand community. Explain why calculating potential costs and benefits is difficult and suggest some ways Motor Trike might track and/or measure these costs and benefits going forward. [Competence: Application]
- Be able to articulate an opinion about how a survey has been conducted and about the general reliability and usefulness of the data. [Competence: Synthesis and Evaluation]
- Use the data in Exhibits 3-12 in the case to support their argument for either starting (or declining to start) a brand community. [Competence: Synthesis and Evaluation]
- Present an argument, based on what Motor Trike knows about the motorcycle industry, the motorcycle subculture, the trike segment, and its own organizational characteristics, for why it should (or should not) start a Motor Trike brand community. [Competence: Analysis]

Note: Learning objective #3 is primarily designed for use in marketing research courses.

VOLUME 35, ISSUE 1

- ***Marketing Management***
- *Marketing Research*
- *Small Business Management*
- *Entrepreneurship*

By-The-Sea Biscuit Company: A Decision in New Venture Analysis

Sherry Finney*, Cape Breton University [P.O. Box 5300, Sydney, Nova Scotia, Canada, 902-563-1176, sherry_finney@cbu.ca]

Paul Finney and Pat Jobe, long-time friends and future business partners, are proposing the establishment of a frozen biscuit manufacturing operation in the now defunct Clearwater Seafood plant in North Sydney, Nova Scotia. Cape Breton Innovation and Research Council (CBIRC), a private corporation, had recently assumed ownership of the plant and wanted to expand and develop local business by creating an incubator within the facility. Finney and Jobe presented a business proposal to CBIRC and the organization was very excited and believed the idea had promise. Finney and Jobe, although convinced of the merits of the product concept, still had some questions that needed answering before they could make a final assessment on the feasibility of the business. The immediate task facing Finney and Jobe is to determine the sales potential for By-the-Sea Biscuit Company.

Intended Courses & Levels

This case may be used in the following undergraduate courses: Marketing Management, Marketing Research, Small Business Management, Entrepreneurship, and New Venture Analysis. To date, this case has been tested in a marketing research course and was well received. Its primary use is for discussion of projecting market potential and profitability of a new venture. The IM Appendix shows how the case might also be referenced throughout a marketing management course to show application of other marketing concepts.

Learning Objectives

The primary learning objectives for students include developing their ability to:

- Estimate market size.
- Prepare sales and profit projections based on assumptions.
- Calculate break-even point.
- Consider the sensitivity of projections to changes in assumptions.
- Discuss the implications of projections for the financial feasibility of a new business.

VOLUME 34, ISSUE 2

- *Marketing Management*
- *Consumer Behavior*
- *Branding*
- *Sustainability*
- *Packaging*
- *Supply Chain Analysis*
- *Family Business*

Litehouse Foods: The Glass Dilemma

John J. Lawrence,* Anubha Mishra, & Marie Pengilly, University of Idaho
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Litehouse Foods has been selling its refrigerated salad dressings in glass jars for 50 years, and glass jars were believed to be an important element in how consumers thought about the Litehouse brand. Two of the company's major competitors had recently switched to plastic, however, and this had helped them achieve a significant price advantage over Litehouse at retail. Switching to plastic jars would save Litehouse \$1.5 million/year and allow it to narrow the price advantage opened up by competitors. Doug Hawkins Jr., Litehouse Foods' Senior Business Development Manager, must develop a recommendation to the company's executive committee on whether to switch to plastic packaging that considers the cost savings potential of plastic against the value of glass packaging to the brand. Complicating this decision were the environmental implications of a switch from glass to plastic, both real and perceived, as well as how a change at this time would mesh with the company's recently launched growth strategy

Intended Courses & Levels

This case was written primarily for use in consumer behavior courses to explore how branding and packaging decisions influence each other and consumer behavior. The case could also be used in courses on business and sustainability to explore how consumers understand and act on the environmental impacts of a company's product and its packaging or in a supply chain management course to explore how supply chain issues feed into a company's broader marketing decisions. The case is most appropriate for upper-division undergraduate courses. The case could also be used at the MBA level.

Learning Objectives

Consumer Behavior Related Learning Objectives

- Understand how consumers develop their perceptions about a product and a brand and how they go about making a purchase decision for a product like salad dressing.

- Be able to draw and use brand schemas to facilitate understanding of consumer perceptions and to make better marketing decisions about actions that might influence consumer perceptions of the product and/or brand.
- Develop the ability to analyze the cost, operational and environmental impacts of a product or packaging change across the entire supply chain and organize thinking about these collective impacts in a way that aids marketing decision making.
- Apply simple capital budgeting tools to evaluate the financial implications of a marketing decision.
- Sustainability Related Learning Objectives
- Gain a basic understanding of how consumers think about the environmental implications of their purchase decisions, with particular focus on the difference and interplay between “my environment” and “the environment.”
- Understand the need for and complexity of a life cycle analysis approach to understand the environmental impact of a product or packaging change. Recognize that how a life cycle analysis is approached and presented can influence how the environmental impact is ultimately evaluated.
- Understand the marketing challenges associated with a scenario where the “greenness” of the packaging (or product) is complex and multi-dimensional and the importance of these multiple dimensions to the consumer is varied and not well understood.

VOLUME 32, ISSUE 1

- ***Marketing***

- *Branding*

- *Market Research*

- *Product Innovation*

- *Positioning*

- *New Product*

- *Brand Extension*

- *New Product Category*

- *Product Launch*

- *Product Development*

- *Blue Ocean Strategy*

Product Innovation at Aguas Danone

Javier Silva*, Fernando Zerboni, Andrés Chehtman and Maria Alonso, IAE Business School [Mariano Acosta s/n° y RN 8, jsilva@iae.edu.ar]

Aguas Danone de Argentina (ADA) faced an adverse scenario. Argentina was undergoing its worst economic crisis in history, and bottled water sales were dwindling (replaced by utility network running water). The company needed to boost its revenues through new, innovative, more value-added product development.

Argentina displayed a significant interest in fitness. By means of several market research studies, ADA managed to identify a segment whose needs were unmet by existing products and brands. New product launches were planned to target that segment. This case describes the dilemmas faced by ADA and the decisions required to formulate and pursue a strategy for new product launching and brand extension in adverse scenarios. More specifically, this case provides an opportunity to discuss how a new product category can be created to address market downturns.

This case describes events that took place in 2002. Research interviews were started in 2004, but the case was published in 2009-12, because Danone delayed its disclosure permission for strategic and competitive reasons. On account of its richness and original contents, the authors decided to write the case despite this delay.

Intended Courses & Levels

This case has been prepared for MBA programs and executive education courses –specifically for teaching modules that tackle marketing, branding and innovation issues. In marketing-related programs, it may be used to show the processes, tools and decisions required to exploit new category branding opportunities. In innovation-related programs, it may be used to illustrate how new products can lead to new category creation. The case is also appropriate for courses in market research: it includes modern qualitative and quantitative methodologies, along with the evolution of the various studies, requiring interpretation of data and analysis of which methodology is best applied at each stage of the process of development and launch of a new product.

Learning Objectives

This case discusses several issues associated with brand extension strategies and new product category development, including:

- Brand extension: Using an existing brand for new products within the same or a new product category.
- Understanding the process and stages involved in launching a new, innovative product.
- The importance of accurately interpreting market research studies and choosing the best research type and methodology for each stage in new product development and launching processes.
- A practical approach to segmentation and positioning notions. What should be our positioning? Who are we competing with?
- Marketing operations in critical times –viewing crises as opportunities to drive creativity, innovation, and business transformations.

VOLUME 31, ISSUE 1

- ***Marketing Research*** **Finale – Just Desserts**

- *Small Business Management*

- *Marketing Management*

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In early 2010, Paul Conforti of Finale, the Boston-area premium dessert restaurant, decided to replace the more traditional research methods with Survey on the Spot mobile surveys to collect market research data. The company used a smart phone-based ‘app’ to collect data from actual customers in real time. With early results in, Conforti found that while Finale was getting positive results, he questioned whether his summary provided a complete picture and has asked market researcher Felicity Klass to do a more thorough analysis. Students have access to the mobile survey data and can perform their own analysis, drawing conclusions and making recommendations to the restaurant co-founder, based on stated goals for the survey. SPSS data file available from contact author.

Intended Courses & Levels

The case is appropriate for undergraduate or graduate electives in Marketing Research. The case allows

students to do both quantitative and qualitative analysis of market research data for a new user of mobile surveys. Students can compare the contents of the summary report to a more detailed data analysis; contrasting the summary report to their own findings.

Learning Objectives

Students can:

- Perform data analysis typical of market research practitioners.
- Explore the meaning of the positive Net Promoter Scores.
- Should discover what drives customer satisfaction at Finale.
- Can practice communicating statistical analysis results to management.

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- ***Marketing Management***
- *Entrepreneurship*
- *Small/Family Business*
- *Strategic Management*

Cowgirl Chocolates

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Marilyn Lysohir, an internationally celebrated artist, started Cowgirl Chocolates in 1997 and had just purchased the company's first advertisement – a \$3,000 full-page ad in the spring 2001 issue of Chile Pepper magazine. The company's hot and spicy truffles, which were made by adding cayenne and other spices to fine European chocolate, had won numerous awards in fiery food competitions. The small business's 2000 revenues, however, were only \$30,000 – insufficient to cover the business's expenses, let alone provide any income to its owner. Marilyn had drained much of her personal savings to keep Cowgirl Chocolates in business, and contemplated what to do next to move her small company to profitability. The tasks Marilyn faced included evaluating her current pricing strategy, identifying and gaining access to effective distribution channels for her products, deciding how to cost-effectively promote her products, and determining how best to use her business's website.

Intended Courses & Levels

This case can be used in senior-level marketing management, business strategy, small business management, or entrepreneurship courses. Many of the questions are geared to a marketing management course but the financial issues in Questions 9 and 10 can certainly expand the discussion to other classes integrating marketing and financial decisions for a start-up small business. The case illustrates how an entrepreneur with limited business skills, weak accounting/financial records, and an inconsistent marketing plan can quickly lead a small company into a spiraling financial downturn. However, the small business using a focused niche strategy has a unique product and a very motivated entrepreneur who could potentially reach profitability if a distributor were found to push her product in an appropriate channel system.

Before discussing the specifics of the marketing and finance issues, it is best to begin with an analysis of the strengths and weaknesses of the company and a clear definition of the market (i.e., hot and spicy

foods or the chocolate candy market) and the behaviors of the likely consumers of this unique product. The last question (Q-10) in the Instructors' Notes focuses on whether it is time to end the business given its losses over the past four years. From a qualitative perspective, this question can be discussed from the information given in Exhibits 4 and 5 and from the cumulative responses to the marketing questions 1 through 8. However, if this case is being used in a small business or entrepreneurship course, it is worthwhile to explore this question using a quantitative analysis. TN-3 and TN-4 provides deeper insight in resolving this issue through a percentage of sales pro forma analysis and through unit sales projections of key products.

Learning Objectives

The case can be used in a number of courses. These objectives are all inclusive of an upper division marketing management course and a small business or entrepreneurship course.

- To have the students see the difficulties that arise when the market, customer, and perceived product benefits are poorly defined.
- To have students critically analyze the "market opportunities and risks" which a niche product like "hot and spicy chocolate truffles" competes in--be it the chocolate candy market, the hot and spicy foods market, or both.
- To have students analyze the marketing mix decisions for consistency so that the product can be "positioned" to the right target market.
- To have the students see the benefit of using the "total product view" to better define the product and its potential market
- To allow students the opportunity to consider the appropriateness of push vs. pull communication and distribution strategies for a small business.
- To have students analyze the product's image, packaging costs and design, in its relation to setting a price [and applying "just noticeable differences" in product pricing and packaging].
- To determine how a well-designed website might be used to increase the product demand for a niche product during the start-up phase of a business.
- To illustrate the importance of maintaining a good accounting system for tracking company sales and expense data.
- To practice using "what-if" analysis for estimating the financial performance of the firm and its potential for profitability.
- To emphasize the need to have a well-developed business plan if one expects to move beyond the "embryonic stage" of a new business



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