

**ABSTRACTS ONLY**

**VOLUME 40  
ISSUE 2  
SPRING 2020**

# **CASE RESEARCH JOURNAL**

**OUTSTANDING TEACHING CASES  
GROUNDED IN RESEARCH**

**SPECIAL ISSUE ON WOMEN ENTREPRENEURS**

**KYLEEN MYRAH,  
CHARLA MATHWICK, AND  
MARGARET J. NAUMES  
SPECIAL ISSUE EDITORS**

**GINA GRANDY, EDITOR**

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NORTH AMERICAN CASE  
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**Outstanding Teaching Cases Grounded in Research**

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# **NACRA**

**NORTH AMERICAN CASE  
RESEARCH ASSOCIATION**

**Editor**

**Gina Grandy  
University of Regina**

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# *Case Research Journal* Editorial Policy

## North American Case Research Association (NACRA)

### CASE CONTENT

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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

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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:

*In submitting this case to the Case Research Journal for widespread distribution in print and electronic media, I (we) certify that it is original work, based on real events in a real organization. It has not been published and is not under review elsewhere. Copyright holders have given written permission for the use of any material not permitted by the "Fair Use Doctrine." The host organization(s) or individual informant(s) have provided written authorization allowing publication of all information contained in the case that was gathered directly from the organization and/or individual.*

## INSTRUCTOR'S MANUAL

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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.
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

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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.

## DISTRIBUTION OF PUBLISHED CASES

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The right to reproduce a case in a commercially available textbook, or instructor-created course pack, is reserved to NACRA and the authors, who share copyright for these purposes. After publication, CRJ cases are distributed through NACRA's distribution partners according to non-exclusive contracts. NACRA charges royalty fees for these publication rights and case adoptions in order to fund its operations including publication of the *Case Research Journal*. Royalties paid are split 50/50 between NACRA and member authors.

## MANUSCRIPT SUBMISSION

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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

[crj.editor@uregina.ca](mailto:crj.editor@uregina.ca)

## **Adopting *Case Research Journal* Cases for use in your classes**

Faculty members can adopt cases for use in their classrooms and gain access to Instructor's Manual through one of NACRA's distribution partners.

NACRA currently has agreements with the following distributors.

- **Harvard Business School Press** (<http://hbsp.harvard.edu/>)
- **Ivey Publishing** (<https://www.iveycases.com/>)
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- **Pearson Collections** (<https://www.pearsonhighered.com/collections/educator-features.html>)
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- **CCMP [Centrale de Cas et de Médias Pédagogiques]** (<http://www.ccmp.fr>)
- **XanEdu** (<https://www.xanedu.com/>)

If you want to use one of these distributors, but cannot find the CRJ case you want, contact the NACRA VP Case Marketing, Brent D. Beal, [bbeal@uttyler.edu](mailto:bbeal@uttyler.edu), to see if we can have it added for you.

Textbook authors can also adopt CRJ cases for inclusion in their textbooks for a modest fixed royalty fee. Please contact the NACRA VP of Case Marketing for more information.

## **From the Guest Editors – Special Issue on Women Entrepreneurs**

Kyleen Myrah, Okanagan College, British Columbia, Canada  
Charla Mathwick, Portland State University, Portland Oregon  
Margaret J. Naumes, University of New Hampshire (retired)

Globally, over 10% of the adult-age work force consists of women entrepreneurs, only three quarters of the proportion of male entrepreneurs.<sup>1</sup> Despite their under-representation, 11 million businesses were owned by women in the U.S. alone, employing nearly 9 million people, and generating \$1.7 trillion in sales,<sup>2</sup> while worldwide, women entrepreneurs controlled \$20 trillion in spending.<sup>3</sup> Moreover, according to a study by Babson College, female-run startups are reported to produce a 31 percent higher return on investment when compared to startups run by men.<sup>4</sup> The under-representation of women in entrepreneurial ventures represents an estimated \$5 trillion missed opportunity for innovation, job creation, and economic growth.<sup>5</sup> To reiterate a question raised by the Kaufman researchers, “What can be done to reduce the barriers women entrepreneurs face?”<sup>6</sup>

The lack of women role models, mentoring networks, access to funding, and achieving a work-life balance are often identified as barriers that stand in the way of women overcoming the challenges of starting their own business. Ironically, the Forte Foundation, a nonprofit focused on women’s advancement and gender equity in business schools, estimates that in 2019, women comprised nearly 40 percent of students enrolled in full-time MBA programs globally<sup>7</sup> and just under 50 percent of undergraduate business graduates.<sup>8</sup> Despite their presence in the classroom, of women are mostly absent in business educational materials.

Case-based education asks students to analyze business issues by stepping into the shoes of the case protagonist. The vast majority of business cases tend to cast men in the protagonist role, which leaves women students seldom seeing themselves in positions of entrepreneurial leadership. Where women are present in a case, they are often depicted as less visionary, and less willing to take risks than male counterparts.<sup>9</sup> The current business case library fails to accurately reflect the reality of today’s workplace and the effects of that omission are magnified when you consider the unique challenges faced by women working in an entrepreneurial context.

This Special Issue was inspired by the need to rectify that gap in business educational materials, by showcasing women who are wearing the many hats required of leaders in entrepreneurial contexts. Women entrepreneurs are showcased in leadership and decision-making roles across a range of subject areas including marketing, organizational culture, human resource management, business strategy, and leadership. The woman protagonists in these cases hold positions ranging from founder to CEO and CTIO, each playing key decision-making roles in their entrepreneurial organization.

Although we are able to include cases representing only a small cross section of the businesses founded and run by women, the cases in this Special Issue feature women in for-profit as well as mission-driven initiatives. The featured organizations operate in the retail, high tech, and transportation sectors. Some of the women protagonists are grappling with decisions that could be faced by leaders in any context, while others are facing challenges unique to executives working to launch, staff, scale, reposition, or grow their fledgling enterprises.

Briefly, the cases in this issue include:

- **Ansah's Dilemma**, where Bertha Ansah Djan, founder and CEO of Pergah Transportation in Ghana, was offered the opportunity to head the country's Microfinance and Small Loan Center (Masloc) where she could improve access to funds for Ghana's many female entrepreneurs but would have to give up active control of her company.
- **Cracking the Code at Coconut Calendar**, where Katherine Regnier, CEO of Coconut Calendar Corporation, was concerned with having a clear strategic and customer focus to successfully grow her scheduling software company to maturity in a highly competitive marketplace, particularly after the company had lost money for the first time during the previous year.
- **Customer Loyalty at Green Zebra**, where CEO Lisa Sedlar worked with her Chief of Technology & Innovation Officer (CTIO), Lenka Zelinek to analyze the financial performance of the customer loyalty program. A decision to maintain, reinvent, or shut down that program was needed, prior to regional expansion of the healthy, convenience-store chain.
- **Betting on Diversity at Advanced Symbolics Inc**, where CEO Erin Kelly and her co-founder Kenton White, Chief Data Scientist, prepared to double the number of employees at their artificial intelligence driven market research firm, while they planned to maintain their diverse corporate culture which is very different from the stereotypical culture at high tech firms. In the face of growing demand, the firm simultaneously faced the challenge of adapting to satellite offices and remote workers.
- **In Mixing Business and Friendship: A Complicated Employee Decision**, Sana Remekie, CEO of a tech company, Consica Corporation, faced a performance management dilemma with one of her personal hires. She was torn between a need for strong performance at her startup firm, and the longstanding friendship and feelings of personal responsibility she held for her employee's career and well-being.

#### A Quick Look at the Cases in Volume 40, Issue 2 (Spring 2020)

Title, Authors, and Conference Year (if presented)	Decision Maker and Location	Decision Focus and Year of Decision	Keywords
<b>Ansah's Dilemma</b> Helena Addae	Bertha Ansah Djan Accra, Ghana	Choice between entrepreneurship and public sector leadership 2009	Women entrepreneurship, Decision making, Public vs. private sector leadership
<b>Cracking the Code at Coconut Calendar</b> Brooke Klassen, University of Saskatchewan	Katherine Regnier Saskatoon, Saskatchewan, Canada	Strategy formulation in highly competitive online technology market 2017	Strategy, Management, Entrepreneurship
<b>Customer Loyalty at Green Zebra</b> Charla Mathwick and Janet Hamilton, Portland State University	Lisa Sedlar, CEO Lenka Jelinek, CTO; Portland, OR, USA	Optimizing revenue through investment in customer loyalty program management.  Q1, 2021	Customer loyalty, Customer lifetime value, Retail management

<b>Betting on Diversity at Advanced Symbiotics Inc.</b> Meredith Woodward & Stephen Risavy, Wilfrid Laurier University	Erin Kelly, CEO Kenton White, Chief Data Scientist Ottawa, Ontario, Canada	Creating a diverse culture in a rapidly growing technology company Spring, 2017	Organizational culture, Diversity, Female founder
<b>Mixing Business and Friendship: A Complicated Employee Decision</b> Stephen Risavy & Meredith Woodward, Wilfrid Laurier University	Sana Remekie, Chief Executive Officer of Conscia Corporation, a tech company located in Mississauga, Ontario, Canada.	Performance Management issue with an employee (who was also a personal friend)  Mid 2019	Human resources management, Employee relations

We want to thank the many authors who submitted manuscripts in response to the call for a Special Issue on Women Entrepreneurs. It was a difficult process to reduce that original group of submissions to the collection of cases included in this issue. We specifically want to thank the publishing authors for their academic rigor and tenacity in responding to the feedback. CRJ cases go through an average of three to four rounds of revision, with reviewers offering feedback and mentorship designed to help authors reach the publication stage. In this issue, four of the six publishing authors were first time contributors to CRJ.

The relevance and timeliness of CRJ cases, their emphasis on decision-making, as well as the excellence in the accompanying Instructor Manual distinguish CRJ cases. CRJ occupies a crucial position in the development of business educational materials, by bridging the gap between business theory, practice, and the classroom. Our reviewers, who receive no visible external rewards, are key to upholding our important academic standards and the CRJ brand. We want to thank the 31 reviewers involved in this Special Issue for their insight, constructive guidance, and the many hours of work that made this Special Issue possible.

This special issue grew out of a conversation at the 2018 NACRA Conference in Orlando, FL involving Gina Grandy and Cynthia Ingols who had served as Guest Editors for a Special Issue on Women's Leadership, published in 2016. As Special Issue Guest Editors, all members of the Case Research Journal's Editorial Board, we met for the first time in person at the 2019 NACRA conference in Tempe, Arizona. We have since enjoyed getting to know one another as we collaborated to publish the latest iteration of CRJ's proactive strategy to address the gender gap in the business case library.

Finally, this special issue would not have been possible without the extraordinary guidance and support provided by Gina Grandy, Editor, Case Research Journal. Her patience in leading us through this process, supporting us as we began to understand our respective roles, and helping us navigate the mysteries of the editorial management platform cannot be overstated. Gina brought a clear vision to this issue and we are proud to be able to add to the collection of women-focused business cases that Gina has personally championed. Women play a crucial role in every aspect of business, including in the sphere of entrepreneurialism where they are making significant contributions that will be crucial to the process of reinvigorating economies across the globe.

We urge educators to adopt and teach these cases to bring the voice of women entrepreneurs into the classroom, to provide role models and examples for all students to learn from. And we encourage our (fellow) case researcher colleagues to be deliberate in seeking out and publishing more cases that showcase women as central protagonists in all forms of decision making; we owe it to our students to include educational materials that reflect the makeup of our readership.

Special Issue Guest Editors

Kyleen Myrah, Okanagan College, British Columbia, Canada  
Charla Mathwick, Portland State University, Portland Oregon  
Margaret J. Naumes, University of New Hampshire (retired)

## NOTES

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<sup>1</sup> Babson College and Smith College (2019). "More Than 250 M Women Worldwide Are Entrepreneurs According To The Global Entrepreneurship Monitor Women's Report from Babson College and Smith College." Accessed October 25, 2020 from <https://www.prnewswire.com/news-releases/more-than-250m-women-worldwide-are-entrepreneurs-according-to-the-global-entrepreneurship-monitor-womens-report-from-babson-college-and-smith-college-300960196.html>

<sup>2</sup> NAWBO Institute for Entrepreneurial Development (2017). "Women Business Owner's Statistics," National Association of Women Business Owners. Accessed October 20, 2020 from <https://www.nawbo.org/resources/women-business-owner-statistics>

<sup>3</sup> Vuleta, Branka (2020). "22 Mind Blowing Women Entrepreneur Statistics." Accessed October 28, 2020 from <https://whattobecome.com/blog/women-entrepreneurs-statistics/>

<sup>4</sup> Candida G. Brush and Patricia G. Green (January, 2020). "Catalyzing change in equity investing: Disruptive models for financing women's entrepreneurship. Diana International Impact Report." Accessed October 24, 2020 from <https://www.babson.edu/media/babson/assets/cwel/Diana-Impact-Report.pdf>

<sup>5</sup> Shalini Unnikrishnan (July, 2019). "Want to Boost the Global Economy by \$5 Trillion? Support Women as Entrepreneurs." BCG.com. Accessed October 21, 2020 from <https://www.bcg.com/publications/2019/boost-global-economy-5-trillion-dollar-support-women-entrepreneurs>

<sup>6</sup> Emily Fetsch, Chris Jackson, and Jason Wiens (August, 2016). "Kauffman Compilation: Research on Gender and Entrepreneurship," The Ewing Marion Kauffman Foundation. Accessed October 24, 2020 from [https://www.kauffman.org/wp-content/uploads/2019/12/gender\\_compilation\\_83016.pdf](https://www.kauffman.org/wp-content/uploads/2019/12/gender_compilation_83016.pdf)

<sup>7</sup> Study International Staff (Nov. 14, 2019). "MBA 2019: 'Remarkable' rise in women enrollment." SI News. Accessed on October 15, 2020 from: <https://www.studyinternational.com/news/mba-2019-women/>

<sup>8</sup> Sharen, Colleen M. and McGowen, Rosemary A. (2019). "Invisible or Cliched: How are Women Represented in Business Cases?" Breschia School of Leadership and Social Change Publications.

<sup>9</sup> Ibid.

# Abstracts Only

## HUMAN RESOURCE MANAGEMENT

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- *Human Resource Management*
  - *Woman Entrepreneur*
  - *Performance Management*
  - *Technology Company*
- Mixing Business and Friendship: A Complicated Employee Decision** 1
- Stephen D. Risavy,\* and Meredith J. Woodwark, Wilfrid Laurier University  
[75 University Avenue West, Waterloo, Ontario, Canada, N2L 3C5,  
srisavy@wlu.ca]

This case describes a complicated employee decision experienced by entrepreneur, Sana Remekie, in mid-2019 after she opted to mix business and friendship. Sana was the CEO of Conschia Corporation, a tech company focused on knowledge management software solutions (i.e., the integration of disparate content from throughout an organization into a single, useable information hub). Sana recruited Caesar Martinez away from his previous employer to work as one of her Solution Architects. Sana hired Martinez in part because of their previous working relationship and subsequent friendship. Unfortunately, Martinez's performance did not meet Sana's expectations. Consequently, Sana was torn between her need for strong employee performance at her startup firm, and her longstanding friendship and feelings of personal responsibility for Martinez's career and well-being. To resolve this dilemma, students are put into Sana's shoes as they formulate and defend a course of action for deciding how to manage Martinez.

### Intended Courses and Levels

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This case was written for the intended audience of undergraduate or graduate level students in a human resource management (HRM) course. This case can be most effectively positioned within an HRM course when the topic of managing employee relations is discussed, most likely later in the course.

### Learning Objectives

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The specific learning objectives that this case was designed to achieve are as follows:

- Identify and assess the contributing factors that have caused a complicated employee–employer relationship, including potential factors related to women and leadership;
- Examine the level of development for HRM systems and processes in a startup and the related implications;
- Assess the options available to address a complicated employee–employer relationship; and
- Decide the best course of action for resolving a complicated employee–employer relationship.

# MARKETING

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• <b>Marketing</b>	<b>Customer Loyalty at Green Zebra: Case C</b>	<b>13</b>
• <i>Customer Loyalty</i>		
• <i>Marketing Metrics</i>		
• <i>Customer Lifetime Value</i>		
• <i>Net Promoter Score</i>		

Charla Mathwick,\* and Janet Hamilton, Portland State University [School of Business, Portland State University, P.O. Box 751, Portland, OR 97207-0751, mathwickc@pdx.edu]

Lisa Sedlar, the CEO of Green Zebra, a healthy convenience-store founded six years earlier, needed to evaluate the financial potential of Zebra Cash, the firm's customer loyalty (LP) program. Although LPs had become a growing trend among c-store competitors, Sedlar had nagging concerns about their cost effectiveness. She needed an objective assessment of the Zebra Cash revenue and margin potential, an assessment made more urgent by the fact that she had cash in the bank to fund operations only through the next several months. Although Sedlar realized that an optimized LP would not solve all her cash flow challenges, the question was whether it could relieve some of the short-term financial pressure. Beyond the cash flow impact, there was also the question of whether the Zebra Cash program had strategic value given her future expansion plans.

## Intended Courses & Levels

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This case is targeted to upper level undergraduate and graduate classes in marketing strategy/analytics or retail management. The case is designed to emphasize the revenue, margin, and customer lifetime value impact of a loyalty program.

Excel-based scenario planning tools are integrated into this case to create hands-on modeling opportunities that focus student attention on both the tactical and strategy implications of the LP forecast

## Learning Objectives

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This case can be used to achieve three learning objectives. After studying this case, students will be able to:

- Utilize customer lifetime value (CLV) scenario modeling as a tool for forecasting incremental revenue/margin growth and for evaluating marketing return on investment (MROI);
- Understand the role that word-of-mouth recommendations play in growing a customer base, working specifically with the Net Promoter Score (NPS); and
- Integrate quantitative results of CLV analysis with the strategic considerations of loyalty program implementation to support managerial decision-making.

# ORGANIZATIONAL BEHAVIOR

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| <ul style="list-style-type: none"><li>• <b><i>Organizational Behavior</i></b></li><li>• <i>Human Resources</i></li><li>• <i>Career Change and Management</i></li><li>• <i>Women Entrepreneurs</i></li><li>• <i>Private and public sector switching</i></li><li>• <i>Personality traits and values</i></li><li>• <i>Decision making</i></li></ul> | <p><b>Bertha Ansah's Career Dilemma: Transition into Public Service or Continue as an Entrepreneur? 25</b></p> <p>Helena M. Addae, * California State University – San Bernardino<br/>[5500 University Parkway, San Bernardino, CA 92407-2318,<br/>haddae@csusb.edu]</p> <p>Bertha Ansah had come a long way from selling confectionaries to her school classmates to owning and leading, Pergah, a very successful transportation services company. In 2009, following a general election, Ghana's incumbent president asked Ansah to become the chief executive officer (CEO) of the country's Microfinance and Small Loans Centre (Masloc). The latter coordinated loans for micro, small, and medium business enterprises (SMEs). SMEs in Ghana employed several women in the lower socioeconomic class, a group that Ansah cared for and supported. Accepting the president's offer would mean an opportunity to help the low income women in Ghana, but also a switch from the private sector to becoming a public servant in a government system that was perceived as inefficient. Ansah was faced with the dilemma of accepting or declining the president's offer. It was Friday evening, and the president wanted an answer from Ansah by the following Monday.</p> |
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## **Intended Courses and Levels**

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This case has been written for undergraduate and graduate organizational behavior and human resources management courses. The case could be used in modules dealing with personality traits, Rokeach's terminal and instrumental values, self-concept and identity, career management and change, bounded rationality in decision-making, entrepreneurial skills and mindset, and public sector versus private business employment.

## **Learning Objectives**

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After studying this case, students will be able to:

- Assess the influence of personality and personal values on career change;
- Analyze the interrelationship between self-concept/identity and career trajectory;
- Identify knowledge, skills, and abilities acquired on a career trajectory and evaluate their implications for career management and change; and,
- Make decisions under conditions of imperfect information.

# ORGANIZATIONAL BEHAVIOR

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- **Organizational Behavior** **Betting on Diversity at Advanced Symbolics, Inc.** 39
- *Organizational Culture* Meredith J. Woodward,\* and Stephen D. Risavy, Wilfrid Laurier University
- *Diversity* [75 University Avenue West, LH4112, Waterloo, Ontario, Canada, N2L 3C5,
- *Entrepreneurs* mwoodward@wlu.ca]
- *Female*

Erin Kelly, CEO of the artificial intelligence driven market research start-up, Advanced Symbolics Inc. (ASI), must decide whether the cultural vision of workforce diversity she and her co-founder have is the right path for their firm seeking to disrupt the market. Having felt excluded in the technology industry as a female employee by “bro culture,” Kelly’s vision was to develop a culture where employees’ diverse needs were accommodated. However, she has repeatedly been told by tech industry experts that their cultural vision will not work because it will be too difficult to manage. Experts also warn that that in order to attract top tech talent, start-ups like ASI need to offer the kind of “fun” environment that tech workers expect – precisely the kind that had made Kelly feel excluded. Should Kelly stick to her vision and risk disadvantaging the fast-growing firm in the tech talent wars, or should she heed the experts’ advice to offer the “fun” culture expected in the industry?

## Intended Courses and Levels

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This case is best suited to a senior undergraduate or graduate course in organizational behavior (OB) to examine the topic of organizational culture which is typically discussed towards the end of an OB course. The case could also be used in a senior undergraduate or graduate course focusing on workforce diversity. In the context of a start-up, students are introduced to the components of organizational culture including a firm’s values, beliefs, assumptions, stories, rituals, symbols, and artifacts. In particular, the case illustrates how organizational culture is influenced by entrepreneurial leaders (i.e. founders). The case illustrates how entrepreneurial leaders influence organizational culture, and highlights the trade-offs that they must make when defining the culture of a new entrepreneurial venture.

## Learning Objectives

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The specific learning objectives that this case was designed to achieve are as follows:

- Understand the components of a firm’s organizational culture.\;
- Analyze the culture of a start-up firm and examine how the components are influenced by entrepreneurial leaders (i.e. founders);
- Compare and contrast the conventional “tech” culture to the start-up firm’s culture of workforce diversity;
- Discuss the pros and cons for the firm of each cultural option and justify your recommendation; and
- Develop a plan to implement and manage the recommended culture as the firm grows.

# STRATEGIC MANAGEMENT

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<ul style="list-style-type: none"><li>• <b><i>Strategic Management</i></b></li><li>• <i>Entrepreneurship</i></li><li>• <i>Small Business Growth</i></li><li>• <i>Technology Industry</i></li><li>• <i>Online Software</i></li><li>• <i>Diversity Issues</i></li><li>• <i>Gender Issues</i></li></ul>	<b>Cracking the Code at Coconut Calendar</b> <p>Brooke Klassen,* University of Saskatchewan [25 Campus Drive, Saskatoon, Saskatchewan, Canada S7N 5A7 <a href="mailto:klassen@edwards.usask.ca">klassen@edwards.usask.ca</a>]</p> <p>The CEO of Coconut Calendar Corporation was dealing with the challenges of managing a growing scheduling software company. After attending a CEO ‘boot camp’, she realized that the company would be pushed out of the market by aggressive competitors if they did not grow more quickly. She accepted an offer of venture capital funding and mentorship from a well-known investor in Silicon Valley and started scaling the company at a rapid pace. The company served a broad range of business customers, from small businesses to large corporations across several industries, and started to diversify their product offerings to include data analytics and other application services. However, Coconut Calendar had experienced decreasing profitability while trying to grow revenue and serve a diverse customer base, recording their first ever annual loss. The CEO, and students, are faced with the challenge of developing a clear strategic and customer focus in order to be positioned to pursue another round of venture capital funding and successfully grow the business to maturity in a highly competitive marketplace. Issues related to small business growth and diversity issues in the technology industry are also explored.</p>	51
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## Intended Courses and Levels

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This case is suitable for use in undergraduate-level courses in strategic management or entrepreneurship. It is well suited for an entrepreneurship module within a strategy course, particularly as the module applies to female leaders in the tech industry. It could also be used in an entrepreneurship course to examine the stages of small business growth and entrepreneurial decision making in tech firms. In terms of the syllabus for a strategic management course, this case is best used to apply the concepts of strategy formulation.

## Learning Objectives

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Students will learn about different facets of entrepreneurship, strategic analysis and decision making including:

- Examining the common problems faced by companies at different stages of entrepreneurial growth (optional);
- Analyzing a company’s internal and external environment;
- Determining a company’s source of competitive advantage;
- Identifying and evaluating a company’s opportunities for growth;
- Making a recommendation regarding appropriate courses of action; and
- Examining the challenges faced by female leaders in the tech industry (optional).



# NACRA

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NACRA is a collaborative organization of approximately 500 researchers, case writers and teachers, mostly in the business disciplines, who support each other's research and writing efforts.

