

ABSTRACTS ONLY

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**OUTSTANDING TEACHING CASES
GROUNDED IN RESEARCH**

GINA GRANDY, EDITOR

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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:

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

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.

DISTRIBUTION OF PUBLISHED CASES

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

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

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

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- **Ivey Publishing** (<https://www.iveycases.com/>)
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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, 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 Editor

Welcome to Volume 41 Issue 1 of the *Case Research Journal*. In this issue of *Case Research Journal* you will find five cases. The primary subject areas for those five cases include: three in Entrepreneurship, and one each in Strategic Management and Operations Management / Business Analytics. Three of these cases are also well positioned for an introductory business course – see “Talk to Amber About Growth”; “Managing a Growing Business: The Xeleum Case”; and, “TD – Preparing for the Future of Banking.”

In the area of Entrepreneurship, all three cases deal, in part, with decisions around growing an entrepreneurial firm. Mark P. Rice’s case, “Managing a Growing Business: The Xeleum Case,” features a serial entrepreneur, Bob Diamond. The case focuses upon Diamond’s most recent venture, Xeleum Lighting LLC which developed and commercialized advanced LED lighting systems. In 2019, Diamond was interested in developing strategies for reviving and accelerating the growth of the firm without jeopardizing the firm’s focus on customer responsiveness. Two other cases in the area of Entrepreneurship focus on transitioning plans and in ways, deciding if the future should be one of growth or stepping aside. “Should we Stay or Should We Go? The Case of Adventure Inn” is written by Lorraine L. Taylor, Michael E. Valdez, and Keith D. Winchester. Co-preneurs Nigel and Tammy Peck were contemplating whether they sell their 25-room motel or stay the course and grow it. Adventure Inn was located in Durango, Colorado and purchasing the Inn was an investment of their life savings. A trusted friend and hotel broker was advising the Pecks to sell after ownership of 18 months. The case provides instructors and students with an opportunity to explore entrepreneurial motivation, timing of entrepreneurial exit, and entrepreneurship in tourism and hospitality. “Talk to Amber About Growth” by Claudia Barrulas Yefremian, Josue U. Arvayza and Nina F. O’Brien details a decision by Amber Wright, an African American blogger and entrepreneur. Second year into the full time entrepreneurial firm advising bloggers and other writers to refine their skills, Wright needed to assess the value proposition of the firm and decide if and how she should grow the company.

This issue also includes a case in Operations Management / Business Analytics. “Siena College: Course Scheduling for the Business Analytics Department” by Joseph McCollum, Shahryar Gheibi and John O’Neill, outlines a decision faced by Dr. Arthur Pierre, who was charged with developing the course schedule for a department at Siena College. The case details the complexity involved in creating an optimization model in an academic setting. The focus of this case will resonate for both students and instructors – no doubt having been affected by scheduling decisions in different ways.

“TD- Preparing for the Future of Banking” by Sofy Carayannopoulos, Michael Ross and Matthew Donovan, sits primarily in the Strategic Management area, but is also fitting for an introductory business course on topics of industry disruption or strategy. In 2018 Toronto-Dominion Bank (TD) was responding to a highly competitive environment. Tim Hogath, Vice-President of Innovation Framework and Strategies, was leading TD’s Innovation Council. He was charged with identifying solutions to the bank’s technology challenge.

As always, I would like to thank the tireless efforts of our reviewers and the editorial team. Please look over the table of contents of this issue and consider using one or more of these cases in your courses, or perhaps even more significantly consider sharing the table of contents from this issue with your colleagues so they can see the interesting cases that will now be available for adoption through our numerous distribution partners, including Harvard, Ivey and The Case Centre.

I would also like to remind our readers of a forthcoming special issue. *CRJ* is 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.

We want to encourage all of you to submit your cases to the *Case Research Journal*. Publication in the *CRJ* provides you the broadest access to distribution and as such presents the greatest opportunity for your case to have real impact on the education of students around the globe. While our review process is quite rigorous, and we necessarily reject more cases than we can accept (our acceptance rate is about 20%), we work hard to turn around case reviews within about 60 days. That means within about 60 days of submission of your decision-focused case, you will have reviewer and editor feedback and a reasonable indication of the potential for your case to earn publication in the *CRJ*. We look forward to seeing your cases.

Sincerely

Gina Grandy, Editor
Case Research Journal

**Congratulations to the Curtis E. Tate Jr. Award Winners
(Best Cases Published in 2019 Volume 39 of the Case Research
Journal)**

Curtis E. Tate Award Winner for Volume 39

Vista Outdoor: A Business Portfolio Under Stress

by

John J. Lawrence

University of Idaho

Curtis E. Tate Award Runners-Up

**Facebook's Privacy Breach: Challenges of Managing an Information-Based
Supply Chain Risk**

by

Maryam Memar Zadeh

University of Winnipeg

Innovation Works Community Bond

by

Melissa Jean

Brescia University

Abstracts Only

ENTREPRENEURSHIP

- *Entrepreneurship* **Managing a Growing Business: The Xeleum Case** 1
 - *Managing growth*
 - *Sales channels*
- Mark P. Rice,* Babson College [231 Forest St, Babson Park, MA 02457, rice@babson.edu]

Bob Diamond was a serial entrepreneur with a track record of success in launching new products and new ventures. His most recent venture was Xeleum Lighting LLC, which he founded in 2011 to develop and commercialize advanced LED lighting systems. From 2016-2018, the firm had experienced rapid growth, but revenue projections for 2019 were down. In order to revive and accelerate growth, Diamond perceived that the firm's primary challenges were related to figuring how to revise its financing strategy, its business model, and especially its sales and marketing strategy. What were the alternative approaches to addressing these challenges, and which would he pursue?

Intended Courses and Levels

This case study has been written with the expectation that the case will be taught in an introduction to business course or an introduction to entrepreneurship course. A topic that is typically in these types of courses is the nature of the micro-market (customers) and macro-market, and how to get customers to buy the firm's products and / or services (sales).

Learning Objectives

- Identify and assess the managerial challenges faced by an entrepreneurial firm pursuing growth.
- Assess the uncertainties faced by an entrepreneurial firm pursuing growth and generate solutions for addressing the uncertainties.
- Identify and evaluate courses of action for an entrepreneurial firm pursuing growth.

ENTREPRENEURSHIP

- *Entrepreneurship* **Should We Stay or Should We Go?: The Case of the Adventure Inn** 17
 - *Hospitality management*
 - *Entrepreneurial exit*
 - *Co-preneurship*
- Lorraine L. Taylor,* Michael E. Valdez and Keith D. Winchester, Fort Lewis College [1000 Rim Drive, Durango, CO 81301-3999, ltaylor@fortlewis.edu]

Nigel and Tammy Peck owned the Adventure Inn in Durango, Colorado.

The process of acquiring the 25-room motel took several years and their combined life savings. After only 18 months of owning the property, their trusted friend and hotel broker suggested that they had made such dramatic improvements through remodeling and rebranding the hotel that it was ready to sell. Nigel ruminated upon the variety of factors at the property level, destination level, and the industry level that would influence the future success of the Adventure Inn. Essentially, Nigel and Tammy were in a position to decide whether the time was right to leverage their existing assets and experience to take on new ventures, or whether they were still working towards their goals as co-owners of a property that had yet to achieve its full potential.

Intended Courses and Levels

This case was written to be used in undergraduate business courses with an emphasis in Entrepreneurship and/or Hotel and Hospitality Management.

Learning Objectives

- Identify and assess how entrepreneurial orientation and intentions inform decision making and success of entrepreneurs.
- To evaluate the motivations and timing of entrepreneurial exit.
- To expose students to entrepreneurship in tourism and hospitality.
- To recommend the best course of action for an entrepreneurial firm.

ENTREPRENEURSHIP

- *Entrepreneurship*
- *Entrepreneurs and founders*
- *Growth strategy*
- *Business models*
- *Gender and intersectionality*

Talk to Amber About Growth

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Nina F. O'Brien,* Claudia Barrulas Yefremian and Josue U. Arvayza,
California State University Los Angeles [5151 State University Dr, Los
Angeles, CA 90032, United States, nobrien2@calstatela.edu]

Amber Wright was an African American blogger, entrepreneur, and founder of Talk to Amber, a communications consulting, training, and coaching enterprise focused on inspiring people to communicate with confidence and clarity. The idea for Talk to Amber emerged in 2012 when Wright identified a need for communication coaching within the blogger community. Although her fellow bloggers were outstanding communicators in writing, they needed help organizing and presenting their thoughts to live audiences. Wright started working with bloggers and other writers to refine these skills. It was spring of 2019 and Wright reflected as she looked towards her second year as a full-time entrepreneur. Wright's first full year taught her that she had to be more specific in setting goals and priorities. Wright also needed to understand what she was trying to achieve with Talk to Amber, what the business was truly about, and how Talk to Amber added value. If Talk to Amber were to

succeed, she had to pivot now from the survival mode of “starting up” to making intentional decisions about Talk to Amber’s long term value proposition.

Intended Courses and Levels

The case is appropriate for introductory courses in Business and Entrepreneurship. It offers students an opportunity to consider the characteristics of successful entrepreneurs and evaluate how small firms create, deliver and capture value, and analyze small firm decision-making.

Learning Objectives

- Identify and evaluate the characteristics of a successful entrepreneur.
- Construct an internal and external analysis of a small entrepreneurial firm.
- Identify and assess how a nascent entrepreneurial firm can create, deliver, and capture value.
- Evaluate the growth potential of a new entrepreneurial firm relative to the entrepreneur’s goals.

OPERATIONS MANAGEMENT

- | | |
|--|---|
| <ul style="list-style-type: none">• <i>Operations management</i>• <i>Business analytics</i>• <i>Scheduling</i>• <i>Linear programming</i>• <i>Optimization</i> | <p>Siena College: Course Scheduling for the Business Analytics Department 49</p> <p>Shahryar Gheibi,* Joseph McCollum and John C. O’Neill, Siena College
[515, Loudon Road, Loudonville 12211-1462, sgheibi@siena.edu]</p> |
|--|---|

Dr. Pierre was responsible for developing a course schedule for the Business Analytics Department at Siena College. He needed to determine which professor would teach a particular class section in an appropriate class period for the Spring 2020 semester. Pierre barely survived the last round of course scheduling due to the compressed delivery time. The importance of the decision and the stressful problems that he had encountered in adjusting to the new timeline necessitated a more systematic approach to scheduling since the shortened timeframe would be implemented for the foreseeable future. His ad hoc approach was too time consuming because he had to incorporate several factors into his course schedule and that often required reworking the entire schedule each time he encountered a conflict. In collaboration with a colleague, they identified a potential solution. They needed to prioritize constraints and build an integer linear optimization model.

Intended Courses and Levels

This case is intended for undergraduate and graduate courses that cover integer linear programming, spreadsheet modeling and optimization. Examples include courses on operations research, operations

management, management science, business analytics and decision sciences.

Learning Objectives

This case provides students with an opportunity to understand scheduling challenges in a service organization and utilize ILP to model and optimize a scheduling decision. It also requires students to push their understanding of ILP as they have to use two-stage modeling in order to arrive at the solution.

Specifically, this case helps students:

- Discern and prioritize constraints in scheduling for a service organization and identify the challenges associated with making scheduling decisions,
- Formulate a scheduling decision into an integer linear optimization model,
- Build a spreadsheet model from the optimization model and determine the optimal schedule using Microsoft Excel Solver,
- Distinguish integer linear programs from non-linear ones,
- Extend the model to account for additional aspects of the real-world scheduling decision.

STRATEGIC MANAGEMENT

- *Strategic management*
- *Digital strategy*
- *Digital disruption*
- *Fintech*

TD – Preparing for the Future of Banking

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Sofy Carayannopoulos*, Michael Ross, Matthew Donovan, Wilfrid Laurier University [Waterloo, Ontario N2L 3C5, scarayannopoulos@wlu.ca]

In the autumn of 2018, Toronto-Dominion Bank (TD) was facing a changing and challenging environment. Fintech start-ups were a continuous source of disruption for the past decade, but some of the world's largest technology firms such as Google and Apple were entering the financial space and disrupting banking by disintermediating banks from their customers. TD had to prioritize which services and customer segments to protect from the industry's on-going digital disruption and develop strategies to protect them. TD had to move quickly as the longer the delay, the more opportunity the disruptors had to entrench themselves and siphon away customers. Tim Hogarth, Vice-President of Innovation Framework and Strategies, was leading TD's Innovation Council which was tasked with identifying solutions to the bank's technology challenges.

Intended Courses and Levels

This case is appropriate for an undergraduate course in strategy or in an introduction to business course to introduce students to industry disruption or strategy. Since the topics of the case involve less mainstream issues such as disruption and organizational partnerships, this case should ideally be used later in the course.

Learning Objectives

- Assess and evaluate the impending threat of industry disruption in the Canadian banking industry.
- Assess the extent to which a traditional bank is well-positioned to respond to industry level disruption.

- Identify, evaluate, and recommend strategic options which respond to disruption in the banking industry.



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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.

