

ABSTRACTS ONLY

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CASE RESEARCH JOURNAL

**OUTSTANDING TEACHING CASES
GROUNDED IN RESEARCH**

RANDALL HARRIS, GUEST EDITOR

ERIC DOLANSKY, EDITOR

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CASE CONTENT

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:
Eric Dolansky, Editor
edolansky@brocku.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.

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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, Terry McGovern, mcgovert@uwp.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 Editor

Welcome to Volume 42 Issue 3 of the *Case Research Journal*. In this Special Issue on Secondary Sourced Cases, you will find three cases that were researched entirely from Secondary Sources. These three cases are “Tesla, Elon Musk, and the SEC: To Tweet or not to Tweet?” by Ram Subramanian, “ASEAN Basketball League: Game on or Game Over?” by Susan Myrden and Muralee Das, and “Boeing 2020: Descent into Corporate and Culture Crisis” by W. Scott Sherman and Randall Harris.¹

The presence of a Special Issue on Secondary Sourced cases in the *Case Research Journal* represents an evolution in case research. The quality of the underlying data is an issue of great significance, as with any serious research endeavor. *Case Research Journal* historically regarded decision-focused cases based upon original primary research to be the gold standard for the premier journal in case research and this is still the norm for submissions to the journal.

However, as pointed out by Professor Gujarathi, “...the line between primary data and secondary data is somewhat thin and getting thinner.”² A great deal of our day-to-day business communication in the 21st century is electronically intermediated. Much of what we historically would refer to as secondary or archival data is becoming increasingly effective at transmitting what I will refer to here as primary data to case researchers. Primary data, then, is direct testimony without intervention or filter or is some type of direct artifact of the organization.³

The following typology should help to clarify this point:

Primary versus Secondary Data in Case Research A Proposed Typology		
	Field Research	Archival Research
Primary Data	Interviews with Key Decision Makers in the Subject Organization	Congressional Testimony Litigation Documents Internal Company Documents Archived Email Threads
Secondary Data	Published Case Studies Qualitative Academic Studies	Wall Street Journal Articles Company Press Releases SEC Filings and Statements

Source: Dr. Randall Harris

¹ Note: This case and instructor’s manual were reviewed and accepted by the Editor, Eric Dolansky, even though Randall Harris was the Special Issue Editor.

² Harris, R., Rowe, W., Grandy, G., Gujarathi, M., & Memar Zadeh, M. (2019). “Writing and Publishing Secondary Data Cases.” *Case Research Journal*, 39(3), page 4.

³ Ibid.

A number of archival sources are capable of transmitting what I would refer to as primary data. Congressional testimony, court records of witness and expert testimony, internal company documents, archived email threads, and video recordings could then be considered as primary, although archival, data sources. Secondary data would then be information or an artifact of the organization that has been subjected to some type of treatment, such as an article about a person or a company in the Wall Street Journal, a company press release, or a corporate web site. This expanded framework of primary versus secondary data may not be satisfactory from every case researcher's perspective.⁴

The frontier for the debate regarding primary versus secondary data sources currently resides with the online world of social media. Are social media threads a primary or secondary source of data for case researchers? How do we manage this innovative source of human interaction? What are the Human Subjects implications for social media research? More to the point – how do we write cases where social media plays a vital role? Increasingly, social media has a direct impact on business and business decision making. This issue is not new to the *Case Research Journal*.⁵

Which brings me to the cases presented here in this special issue. The central issue in Ram Subramanian's case "Tesla, Elon Musk, and the SEC: To Tweet or not to Tweet?" is tweets on the social media platform Twitter by Tesla CEO Elon Musk. A tweet by Elon Musk had the potential to move global markets, and the Board of Tesla, as well as the U.S. Securities and Exchange Commission, was unsure how to respond. A central question of the case: what was the fiduciary responsibility of the Tesla Board regarding their CEO's social media usage?

Susan Myrden and Muralee Das' case "ASEAN Basketball League: Game on or Game Over?" focuses on whether or not founder Anthony "Tony" Fernandes should restart the ASEAN Basketball League in Southeast Asia in the wake of the COVID-19 pandemic. Basketball play had been stopped, finances were strained, and the leadership of the league was in transition. Does the league re-start? What were the other options, particularly given the lingering impact of the global pandemic? Notably, research for this case included quotes from Twitter and Instagram.

Finally, W. Scott Sherman and Randall Harris' case "Boeing 2020: Descent into Corporate and Culture Crisis" centers on Boeing Board Chair Lawrence Kellner grappling with deeply embedded problems related to the company's governance and corporate culture. The company was also balance sheet insolvent. The case takes a deep dive into the history and decisions that led the company to its predicament in 2020. The question for Kellner was: what actions should Boeing and the Boeing Board take to resolve the company's myriad problems? Research on this case included extensive testimony before the U.S. House of Representatives.

My hope for this special issue is that these cases find their way into your classroom.

Randall Harris, Special Issue Editor
Case Research Journal

⁴ Ibid. See Dr. Rowe's comments on page 5.

⁵ Shah, G., Rovenpor, J., & Jafar, M. (2016). "A Brand under Attack: The Boycott of Stolli Vodka and the Power of Social Media." *Case Research Journal*, 36(2), pp. 1-20.

Editor's Note

First and foremost, I would like to thank Randall Harris for stepping into the role of Special Issue Editor for Volume 42, Issue 3 of the Case Research Journal. Taking on this responsibility is no small task, and to edit an issue of the journal on one's own is especially taxing. I commend Dr. Harris and the cases he managed; all three special issue cases are outstanding, and I urge you to consider adopting them in your classes.

Equally strong are the other three cases in this issue. "Duluth Coffee Company: Time for a New Distribution Strategy," by Rajiv Vaidyanathan, Marat Bakpayev, and Ahmed Maamoun, presents a clear management decision about expansion of distribution, set in a small entrepreneurial venture. As a marketing professor myself, I can say that there had been a lack of strong cases in the area of distribution, and this, along with other CRJ cases published recently, are filling this need. "Critical Concrete: Pivot Possibilities for a Sustainable Architecture Social Enterprise," by Stephanie Elizabeth Raible, is also set in a small organization, though this one focuses on a social mission. Looking at a change in strategic direction and managing pressures around finances form the basis for the decision in this case. Last, "Streetwise Mortgages: Growing More Efficient," by Ebrahim Mazaheri and Eric Dolansky⁶ examines a 'success problem' experienced by the owner of a mortgage brokerage. She has more customers than she can handle and must choose target markets and find tools to effectively screen clients.

To echo Dr. Harris's comment, I hope these cases fill a need in your courses and that you share them with your colleagues who may find them interesting and relevant.

Eric Dolansky, Editor
Case Research Journal

⁶ This case and instructor's manual was under review before I assumed the role of journal Editor. The entire review process and final acceptance decision was managed by previous Editor Gina Grandy.

Abstracts Only

CORPORATE GOVERNANCE

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| <ul style="list-style-type: none">• <i>Corporate Governance</i>• <i>Strategy</i>• <i>Board of Directors</i>• <i>Culture</i> | <p>Boeing 2020: Descent Into Corporate and Culture Crisis 1</p> <p>W. Scott Sherman,* Randall D. Harris, Texas A&M University-Corpus Christi [6300 Ocean Dr., Corpus Christi, TX, 78412-5808, scott.sherman@tamucc.edu.].</p> |
|--|--|

Lawrence Kellner, Boeing Company Board Chair, was faced with assessing Boeing's strategic and financial condition in January 2020 as recent events threatened the aerospace firm's survival. The most visible issue was the global grounding of all Boeing 737 MAX airliners. Boeing also faced safety issues, production delays, and cost overruns with the remainder of its commercial airliner business, resulting in negative 2019 earnings, and total debt almost doubled in one year to \$27 billion. Boeing also suffered competitively as its main commercial airliner competitor, Airbus, sold more commercial airliners than Boeing in 2019. The case seeks causes for the current crises by examining Boeing's history since its 1916 founding, its engineering leadership up to its 1997 merger with rival McDonnell Douglas, and the board's decisions since the merger. Critical decisions for discussion include what potential short-term and long-term actions Kellner may recommend to the board to quickly address the crises.

Intended Courses and Levels

This case is intended for graduate-level and executive education courses in Strategic Management. The case also is intended to be taught toward the end of the course when instructors will normally begin discussing corporate governance, financial management, and organizational culture as a strategic resource. The case is intended to illustrate the potential links between board actions, firm strategy, organization culture, and competitive outcomes.

Learning Objectives

After reading, analyzing, and discussing this case, students should be able to:

- Communicate the pressing problems faced at the case conclusion.
- Analyze and determine the role of the board in creating current competitive challenges.
- Examine the role of the board in shaping and determining an organizational culture supportive of strategic actions.
- Compute financial ratios for and draw conclusions regarding the financial condition of the company.
- Assess how well the board has guided the company
- Establish a board agenda to ensure proper corporate governance structures and policies focused on strategic and financial success.

CORPORATE GOVERNANCE

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| <ul style="list-style-type: none">• <i>Corporate Governance</i>• <i>Strategic Management</i>• <i>Board of Directors</i> | <p>Tesla, Elon Musk, and the SEC: To Tweet or Not to Tweet? 29</p> <p>Ram Subramanian,* Stetson University [421 N. Woodland Blvd., Unit 8398, DeLand, Florida 32723, rsubram1@stetson.edu].</p> |
|---|--|

In April 2019, Robyn Denholm, the chairperson of Tesla, Inc.'s board was asked by a judge to work with the United States Securities and Exchange Commission (SEC) to settle the contempt of court charges brought by the agency regarding Elon Musk's, the CEO, use of Twitter to make factually incorrect market-moving tweets about the company's prospects. The contempt charge was about a violation of protocol that was set up following an adverse 2018 verdict against the company on a similar charge. Denholm and Tesla's board had to act against the backdrop of several factors, including Musk's tremendous popularity among his 24 million Twitter followers, a soaring Tesla stock price, and an ongoing defamation lawsuit that stemmed from a Musk tweet after a daring rescue of a stranded Thailand soccer team by a British diver in 2018. In settling with the SEC, the board had to consider a variety of options, including the nuclear option of firing Musk that was suggested by a Tesla investor.

Intended Courses and Levels

The case deals with corporate governance and the role of a public company's board. While corporate governance is typically covered in finance, accounting, and law courses, the instructor's manual is specific to using the case in an upper-level undergraduate or an MBA strategic management course. In a strategic management course, corporate governance is usually addressed toward the end of the course; as such, the case is best used after the class has had exposure to the basic concepts in corporate governance.

Learning Objectives

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

- Understand the fiduciary duty of a corporate board of directors.
- Analyze the implications of a CEO's usage of social media.
- Evaluate the independence and effectiveness of a board.
- Identify and evaluate the options open to a board in fulfilling its fiduciary responsibility.

STRATEGIC MANAGEMENT

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| <ul style="list-style-type: none">• <i>Strategic Management</i>• <i>Sports Management</i> | <p>ASEAN Basketball League: Game On or Game Over? 51</p> <p>Muralee Das* and Susan Myrden, University of Maine [5723 DP Corbett Building, Orono, Maine 04469-5723, muralee.das@maine.edu].</p> |
|--|---|

The case focuses on the ASEAN Basketball League (ABL), one of Asia's major regional professional basketball competitions. Launched in 2009, the league struggled to become financially viable in its first decade, and quickly encountered many challenges. When COVID-19 derailed its 2019-2020 season, the ABL abruptly suspended all games and never resumed competition. There was even a launch of a rival league called the East Asian Super League (EASL) during the pandemic that had detrimental ramifications for the league's fan base. Further, as a regional league, international air travel COVID-19 restrictions and quarantine requirements made it impossible to have the existing ABL competition format resume. These moves had a major impact on the future sustainability of the ABL. As the case concludes, students are put in the shoes of the ABL founder, Fernandes, who must decide from three strategic options: to re-start the league now, keep the league suspended, or make the difficult move to discontinue the league.

Intended Courses and Levels

The case was written to target an undergraduate course in strategic management. It is suitable to demonstrate the importance of analyzing strategic inputs, strategy formulations, and strategic implementation for an organization operating within regional, national, and international markets and cultures. We suggest using the case as an assignment for a course in the junior (3rd) or senior (4th) year of an undergraduate degree. One reason is that the case has an international setting (i.e., Southeast Asia), and we believe junior or senior level students would have already been exposed to global factors that will help them better understand the case context. Within a strategic management course, Teaching Approach 1 can be used either for a junior level course or used for a senior level course sections of "Strategic Management Inputs" (i.e., external environment and internal organization analysis) and "Strategy Formulation" (i.e., business level strategy). Teaching Approach 2 (which has an additional question on strategy implementation) would be recommended for a senior level course. The case would be most suitable here as an assignment at the end of this senior level course.

The use of a sports league such as the ABL differentiates the case from that of a traditional organization in that it produces neither a traditional product nor service but rather one that creates "entertainment content" that can be monetized. Such uniqueness provides an extra level of complexity for analysis and strategy formulation. In addition, the case highlights the acute need to robustly assess market forces at play and deliver business and corporate level strategies for the intended firm outcomes.

Learning Objectives

By analyzing this case, students should be able to:

- Conduct a PESTEL (Political, Economic, Social, Technological, Environmental, and Legal) analysis and Porter's Five Forces industry level analysis to determine the external forces that can influence

the firms' competitiveness.

- Conduct a SWOT (Strengths, Weaknesses, Opportunities, and Threats) firm level analysis of an organization's resource capabilities and its core drivers.
- Determine an organization's generic business level strategy using Porter's model to achieve sustainable competitive advantage.
- Identify key stakeholder relationships that an organization needs to manage strategically.
- Understand how the regional, national, and global management factors directly impact the strategic management of organizations.
- Based on the strategic analysis of an organization, assess the strategic options available to the firm and make a recommendation for a future strategic option or decision.

MARKETING

- **Marketing**
- *Marketing Plan*
- *Niche market*
- *Customer Value*
-

Streetwise Mortgages: Growing More Efficient

79

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Struggling to maintain a work-life balance after the birth of her second son in 2011, Dalia Barsoum left her executive position in wealth management at the Bank of Montreal to start her own business. She founded Streetwise Mortgages, an independent mortgage brokerage that targeted customers interested in purchasing investment properties. Customers were offered hours of free consultations on building wealth through real estate and had access to Barsoum's network of support. The value of these consultations to customers caused many clients to book meetings, consuming time and resources, without generating a penny in revenue for Streetwise. By August 2020, Barsoum felt overwhelmed by the number of requests; she had only so many hours for consultations and needed to come up with a solution. She was considering charging a refundable fee for consultation meetings to discourage less-serious customers from booking one. Alternatively, she liked the idea of a screening tool, such as a questionnaire that determined customers' needs, resources, and goals to tailor the advice and services better.

Intended Courses and Levels

This case is designed for use in an undergraduate marketing course using one of two possible approaches. For an introductory course, appropriate because of the focus on concepts such as segmentation and targeting, more information would be provided to students in advance of the class session (specifically, an IM exhibit that provides much of the quantitative work already done). The case would also be effective later in a program when students are integrating strategic elements such as targeting with tactical elements like pricing and promotion. These more advanced students would be provided only the case as written and would be tasked with doing the quantitative work on their own.

The reason for the two possible audiences is that this case very plainly sets out the need for not only a clearer

target market but a way to discourage low-value clients from seeking out the firm's services. While most students understand the concept of segmentation and targeting, they often are shy about taking action that might 'cut off' customers and possibly turn them away. For introductory students, this case analysis introduces these ideas and the need for clear, focused decision-making. For more advanced students, this case puts their willingness to specifically target a segment (and therefore devote fewer resources to others) to the test. The case also offers an opportunity for more advanced students to perform extensive quantitative analysis (e.g. discussion questions 2 and 5).

For the more advanced audience, because of the qualitative and quantitative work that can be done in the case, it would also function well as an assignment or exam case and has been used that way. There would be a clear distinction between those students who do the quantitative and qualitative analysis and those that do not, and between those that are willing to put a targeting strategy in place and those that are more wishy-washy about it.

Learning Objectives

The learning objectives for this case are as follows:

- Understand the need for segmentation and targeting and how to introduce them within a marketing strategy.
- Integrate both quantitative and qualitative analysis skills to assess customer value and introduce the concept of Customer Lifetime Value in support of a recommendation.
- Create marketing tactics for a niche business that are consistent with a segmentation and targeting strategy.
- Recommend a plan of action that ensure alignment of the marketing mix and focuses on profitability, not sales volume, as the measure of business success.

MARKETING

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| <ul style="list-style-type: none">• Marketing• <i>Distribution Management</i>• <i>Marketing Channels</i>• <i>Entrepreneurship</i>• <i>Small Business</i>• <i>Branding</i> | <p>Duluth Coffee Company: Time for a New Distribution Strategy 91</p> <p>Rajiv Vaidyanathan,* Marat Bakpayev and Ahmed Maamoun, University of Minnesota Duluth [1318 Kirby Drive, Duluth, Minnesota 55812-3002, rvaidyan@d.umn.edu]</p> |
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Eric Faust founded the Duluth Coffee Company (DCC) in 2012 with a \$10,000 loan and a lot of passion for coffee. The company was a classic garage startup, where Faust had a 3-kilogram roaster cranking up limited batches of coffee and selling them to local coffee shops and restaurants. Then Faust rented a store in downtown Duluth, Minnesota. He turned it into a coffee shop with an upgraded 12-kilogram roaster that occupied a central spot at the café. As Faust was developing direct relationships with coffee growers, he realized that DCC could play a bigger role in improving farmers' livelihoods by buying more of their coffee. Faust decided to upgrade to a 70-kilogram roaster to be custom built and installed in the café. With the increase in the volume of the coffee he roasted and sold, the company would need to have a new distribution strategy. The marketing manager suggested outsourcing the distribution function to an experienced

distributor(s). However, Faust was wary they might lose control over the brand he built from the ground up. Is it time for a new distribution strategy?

Intended Courses and Levels

This case is ideal for undergraduate business courses, such as Principles of Marketing, Supply Chain Management, or Entrepreneurship. Since the case shows an entrepreneur facing decisions related to their company's growth, it is helpful for class discussions on startups, entrepreneurship, decision making, and the strategic implications of the distribution component of the marketing mix. The case could be discussed after covering the "Marketing Channels" or "Distribution" chapter of a typical marketing textbook. Before discussing the case, students should be familiar with the 4Ps (product, price, place, promotion), segmentation, targeting, and positioning. The case works well 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 the significance of distribution in a company's overall business and marketing strategy.
- Demonstrate comprehension of the complexity of distribution decisions and the trade-offs involved in choosing a distribution strategy.
- Analyze how a single business decision can affect the company's overall strategy and direction.
- Debate the challenges involved in starting and running a small business while recognizing how an entrepreneur's vision and passion affect the company's distribution strategy.
- Recommend a course of action for a new distribution strategy while making reasonable assumptions.

SOCIAL ENTREPRENEURSHIP

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| <ul style="list-style-type: none">• <i>Social Entrepreneurship</i>• <i>Social entrepreneurship</i>• <i>Entrepreneurial business strategy</i>• <i>Cultural entrepreneurship</i>• <i>Entrepreneurship</i>• <i>Environmental consulting services</i> | <p>Critical Concrete: Pivot Possibilities for a Sustainable Architecture Social Enterprise 101</p> <p>Stephanie E. Raible,* University of Delaware [132 E. Delaware Avenue, Newark, DE 19711, sraible@udel.edu].</p> <p>By the late spring of 2019, it was clear to Samuel Kalika, Founder of Critical Concrete (CC), a sustainable architecture social enterprise in Porto, Portugal, that his organization needed to pivot. While he was not exactly clear on what strategy would help CC more reliably and consistently deliver on its social mission, Kalika was convinced that the organization's current focus on the Critical Concrete Summer School (CCSS) was not financially sustainable for much longer. The staff was spending an entire year in its planning and coordination, and the financial situation seemed inconsistent and fragile, among other challenges. He had to quickly decide on how to move forward and redirect their efforts. The 2019 CCSS would conclude in</p> |
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only three months, and after that, there was nothing scheduled, which also meant no funds were coming in beyond that point. CC needed to pivot, but Kalika had to figure out what to do next. Considering the mix of resources and challenges in the picture, what could he do to pivot the organization?

Intended Courses and Levels

The case is written to be used in undergraduate courses in entrepreneurship, including social entrepreneurship, environmental/eco-entrepreneurship, and cultural/arts entrepreneurship, but could be used within graduate courses. The case would also serve classes within social and sustainable architecture programs that discuss entrepreneurship concepts in the classroom. This case highlights the entrepreneurial process of adapting strategy. An integrated strategy within social entrepreneurship contexts attempts to align strategy with organizational mission, resources, and the external environment and its realities (Hambrick & Frederickson, 2001). For social entrepreneurs, mission and strategy should go together, with the mission being the “North Star” to guide them and their strategy being how to operationalize it (Dees et al., 2002). Because social entrepreneurs respond to the primary strategy question “How do we generate a social impact?” (Ormiston & Seymour, 2011), students will focus on how Kalika has been able to have an impact through CCSS, and how he could translate those learnings and resources into a new strategy. Rather than focusing on next steps for action and implementation, this case places more of an emphasis on the strategic process of entrepreneurs. The ability to sustain and potentially grow its value is an important element for CC, so for the purposes of this case, financials are not directly factored in. This means that this case can be utilized in courses with and without financial components in the curriculum.

Learning Objectives

Students who complete the case and participate in the class discussion should be able to do the following:

- Apply bricolage theory to Kalika’s actions as an entrepreneur/social entrepreneur.
- Evaluate the social mission of an organization and its ability and capacity to deliver its intended value while still bringing in an income.
- Examine the role of pivots within the entrepreneurial process.
- Synthesize and analyze information and develop strategic recommendations.



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