ABSTRACTS ONLY

VOLUME 43
ISSUE 2
SPRING 2023

CASE RESEARCH JOURNAL

OUTSTANDING TEACHING CASES GROUNDED IN RESEARCH

ERIC DOLANSKY, EDITOR

PUBLISHED BY THE
NORTH AMERICAN CASE
RESEARCH ASSOCIATION

IN PUBLICATION
SINCE 1980

Outstanding Teaching Cases Grounded in Research

Volume 43 • Issue 2 • Spring 2023

Case Research Journal

Published by the

North American Case Research Association

Editor

Eric Dolansky
Brock University

Published quarterly by North American Case Research Association, Inc.

Cover design, Lisa Fahey, originables.com.

NACRA membership for individuals is US $40. Subscriptions to the Case Research Journal are US $85/year for North American subscriptions and US $115/year for subscriptions sent outside North America.

To join, register and pay online at: https://www.nacra.net/

POSTMASTER: Please send address corrections to:

North American Case Research Association
Christina Tathibana, Assistant Editor
Case Research Journal
crj.christina@gmail.com

Printed in the United States of America

10 9 8 7 6 5 4 3 2 1

ISSN 2328-5095
ISBN: 978-1-7377586-6-2

NACRA Officers 2022–2023

EXECUTIVE COMMITTEE AND BOARD OF DIRECTORS

President
Nicole M. Amos
Johnson & Wales University

Immediate Past President
John D. Varlaro
Johnson & Wales University

Vice-President Programs
Olga Kandinskaia
Cyprus International Institute of Management

Vice-President Programs-Elect
Melanie Reed
Thompson Rivers University

Vice-President Communications
Lisa Facey-Shaw
University of Technology, Jamaica

Vice President, Case Marketing
Terry McGovern
University of Wisconsin-Parkside

Vice President, Membership
Grishma Shah
Manhattan College

REPRESENTATIVES OF REGIONAL AND AFFILIATED ORGANIZATIONS

Canada (ASAC)
Meredith Woodwark
Wilfrid Laurier University

Mexico (ALAC)
Martha Elena Moreno Barbosa
Tecnologico de Moterrey Campus Puebla

Eastern U.S. (CASE)
William Naumes
University of New Hampshire (Retired)

Southeastern U.S. (SECRA)
Susan Peters
University of North Carolina

Southwestern U.S. (SWCRA)
Kendra Ingram
Southeastern Oklahoma State University

Society for Case Research (SCR)
Andy Borchers
Lipscomb University

Western U.S. (WCA)
Melanie Reed
Thompson Rivers University

Caribbean Case Researchers Association
Paul Golding
U Technology – Jamaica

International Case Research Association (ICRA)
William Wei
MacEwan University Business School

Directors at Large
Brooke Klassen
University of Saskatchewan
Erin Pleggenkuhle-Miles
University of Nebraska Omaha
Miriam Weisman
Florida International University

Advisory Council Chair
Janis Gogan
Bentley University

Advisory Council Vice Chair
Randall Harris
Texas AM University – Corpus Christi

Case Research Journal Editorial Policy
North American Case Research Association (NACRA)

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.

NACRA currently has agreements with the following distributors.

- **Harvard Business School Press** (http://hbsp.harvard.edu/)
- **Ivey Publishing** (https://www.iveycases.com/)
- **The Case Centre** (http://www.thecasecentre.org/educators/)
- **Pearson Collections** (https://www.pearsonhighered.com/collections/educator-features.html)
- **McGraw Hill Create** (http://create.mcgraw-hill.com/createonline/index.html)
- **Study.net** (www.study.net)
- **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, 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 Editor

What makes a case great? Why do we use cases in the classroom, rather than problem sets, exercises, or discussion questions? No, I'm not having an existential crisis: I'm considering what is at the heart of the case research and teaching process. While there are many good reasons to use cases, one thing that they provide is the opportunity to consider a problem for which there is not one 'right' answer, and to make trade-offs. In this editorial for volume 43, issue 2 of Case Research Journal, I'd like to explore the notion of trade-offs.

To me, every decision-focused case should have a trade-off in some form. Whether this is between qualitative and quantitative considerations, between perspectives of two people or business units, or the interests of different stakeholders, there should be conflict, competing priorities, and complex problems. After all, a key reason to use cases is to mirror real-world decision-making, and in the real world, problems are rarely straightforward. A dilemma is not a dilemma if there is one clearly superior option.

The cases in this issue contain fascinating, difficult, and valuable trade-offs for students to consider. Some look at balancing quantitative outcomes with qualitative considerations, such as in "Ambuja Cement: Gender Diversity Challenges in the Cement Industry," by Sushmita Srivastava and K.C. Shyam. This case presents a decision between hitting short-term quantitative targets for gender diversity, or creating a workplace that will serve those goals better in the longer term. Similarly, in "Synapse: Creating a New Social Media Campaign," by Loran T. Jarrett and Denise H. Gravatt, the protagonist must balance hitting attendance goals for a major event with targeting the right customers through the right channels. Trying to achieve profitability, and examining a trade-off between costs and potential revenues from a wider customer base along with risk and uncertainty, is the focus of "Pace Delivers: A Student-Run Campus Food Delivery Service," by Kathryn. F. Winsted and Janice K. Winch.

"La Jolla Children's Pool: Who Has Rights to the Beach?" by Philip Gamaghelyan, Lisa Thomas, and Maria Helena Jaen, looks at trade-offs between the priorities of different stakeholders to a community dispute and involves an in-class mediation activity to bring those perspectives to light. Competing priorities are also the focus of "Stayfilm: From a Brazilian Digital Startup to a Global Scaleup," by Fernanda Cahen, Erica Berte, and Kay Keels. In this case there are a host of different considerations, both financial and otherwise, for the founders of a firm looking at a new geographic location for its headquarters. Internal conflict and trade-offs, and an examination of who one is, what type of role is ideal, and where that role may be found, are at the heart of "Susan Duffy: Leading Quietly," by Mary L. Shapiro.

Given the above point that good cases involve conflict and the absence of a 'right' answer, it is sometimes surprising to Case Research Journal authors that the editorial policy is a) there should be a discussion question that addresses the key decision in the case and b) a clear, straightforward response to this question is required. The former is not controversial, but the latter, given the open-endedness and complex nature of case decisions, often is. After all, how can a clear, straightforward response regarding what to do about the key problem in the case be provided, if no correct response exists?

Consider the other perspective, that of the instructors and students. How can they utilize the case effectively without some assessment of the decision in the case? Therefore, a response is necessary: not necessarily the 'correct' one, or the only one, but the one that appears to be supported by evidence. There is a large difference between presenting a response to this question and qualifying it as one option of many (though the best-supported one), with room for dissent, and presenting a response that essentially explains that all (or many) possible responses are valid. As one of my own case teachers, from my time as an MBA student, told me: “with cases there are no right answers, but there are wrong ones.”

Trade-offs like those found in the cases in this issue of Case Research Journal allow for multiple possible courses of action, some better than others. In order to maximize the pedagogical value of these cases we need not only to present interesting dilemmas but help guide our students through the process of analysis, drawing conclusions, and coming to a clear decision that is consistent with the evidence. All students don’t have to end up with the same decision, but they should arrive at one that can be supported by the analysis and evidence. I urge you to look at the cases in this issue, as they do this well, clearly, and in a useful way.

As always, if you have questions, comments, or suggestions, feel free to contact me at edolansky@brocku.ca. I am happy to receive your cases through ScholarOne, to discuss your work via e-mail, and to help you with your own journey as case researchers, with the goal of publishing your work.

Sincerely
Eric Dolansky, Editor
Case Research Journal

Contents

ENTREPRENEURSHIP

- *Entrepreneurship*
- *E-commerce*
- *Vendor selection*
- *Business model canvas*

Pace Delivers: A Student-Run Campus Food Delivery Service 1

Janice K. Winch,* Pace University and Kathryn F. Winsted, Pace University [One Pace Plaza, New York, NY 10038-1598, jwinch@pace.edu]

Pace Delivers, at Pace University in Pleasantville, NY, was an on-campus student-run food delivery service launched as a pilot in April 2017. On a residential campus where many students did not own vehicles, Pace Delivers provided late-night food deliveries to students desiring off-campus restaurant food. As of November 2017, Pace Delivers had incurred heavy losses, in part due to its inability to accept Flex Dollars, a part of meal plan money students could use outside the campus dining services. The vendor the team hired to build an order-taking site for accepting Flex Dollars had not yet completed the site with the promised features. Therefore, the team had been able to accept only credit card payments through a Shopify e-commerce site. Believing that the business was losing sales with its inability to accept Flex Dollars, the student managers had to decide whether to wait for the vendor to come through or adopt some other online payment alternative. The team also needed to come up with other ideas to help the business survive and become profitable in the long term.

HUMAN RESOURCE MANAGEMENT

- *Human Resource Management*
- *Diversity and Inclusion*
- *Workforce Planning*
- *HR Strategy Alignment*

Ambuja Cement: Gender Diversity Challenges in the Cement Industry 19

Sushmita Srivastava*, SP Jain Institute of Management and Research, and KC Shyam, IDFC First Bank [sushmita.srivastava@spjimr.org].

The Chief Human Resources officer (CHRO) of Ambuja Cement had to increase the gender diversity mix of the workforce to comply with the Global Headquarters (HQs). The targets set by the HQ appeared unrealistic and unachievable to the CHRO, given the context of the manufacturing and the cement sector in India. Ambuja Cement was known for its "I Can" philosophy, where even its hazardous plants were commissioned within the deadlines. The CHRO had to decide whether hiring the women employees to comply with diversity target should be his priority, or creating more inclusiveness within the workforce. While increasing the diversity in the workforce was important to attract and retain

more women in the male dominated workforce, the sudden increase in numbers may have had consequences. As the deadline for compliance of diversity target neared, the CHRO was answerable for his actions.

LEADERSHIP

- ***Leadership***
- *Career Management*
- *Organization Fit*
- *Diversity*

Susan Duffy: Leading Quietly 35

Mary L. Shapiro,* Simmons University Institute of Inclusive Leadership [905 Randolph Street, Canton, MA 02021-1366, mary.shapiro@simmons.edu].

As an introverted leader, Susan Duffy was well aware of the misalignment between her quiet, often 'lead-from-behind' style, and society's definition of leadership (gregarious, direct, extroverted). Over her 35 years, as she progressed into increasingly senior roles, she had developed strategies to address that misalignment: flexing, managing others' perceptions, and negotiating the conditions she needed to contribute. By doing so she had successfully innovated, built support for her initiatives, and executed in multiple industries. Duffy was now considering her next career move and wanted to be strategic about it. By reviewing her career history, she planned to identify the metrics essential for that next position. Specifically, who was she as a leader; and what job elements did she need to be motivated and satisfied? 'Where' was the third determinant and most salient for Duffy: what organization had a culture that would recognize, value, and support her quiet introverted leadership style?

MARKETING

- ***Marketing***
- *Social Media Marketing*
- *Social Media Promotions*
- *Organic/Paid Social Media*
- *Buyer's Journey*
- *Targeted Audiences*
- *Budgeting Decisions*
- *Entrepreneurship*

Synapse: Creating a New Social Media Campaign 47

Loran T. Jarrett*, University of South Florida and Denise H. Gravatt, Florida Atlantic University [4202 East Fowler Avenue BSN3403 Tampa, FL 33620, loranjarrett@usf.edu].

The newly hired interim Vice President of Marketing and Public Relations for Synapse—a not-for-profit organization serving the Florida entrepreneurial community—learned at a first meeting with her new bosses that she had fewer than 80 days to execute an urgent marketing task: promote and sell 5,000 tickets for Synapse's third annual event in January 2019. The goal of the yearly event was to connect the members of the innovation economy. The interim VP of Marketing and Public Relations, and the student, must strategize a successful social media promotion campaign to sell tickets to three distinct targeted attendees—students, entrepreneurs, and corporations—in a short time frame with a limited budget.

MEDIATION

- ***Mediation***
- *Negotiation Strategies*
- *Community Relations*

La Jolla Children's Pool: Who Has Rights to the Beach? 61

Philip Gamaghelyan,* Lisa Thomas, University of San Diego and María Helena Jaén, University of San Diego and Universidad de Los Andes, Colombia [Kroc School of Peace Studies, KIPJ 122, 5998 Alcala Drive, San Diego , California, 92110, pgamaghelyan@sandiego.edu]

In the seaside town of La Jolla, a community conflict revolved around a coastal cove known as the Children's Pool. A colony of seals took up residence in the pool, which previously was enjoyed by children. The feud escalated from public outrage to death threats and arrests. In a narrow sense, Children's Pool was a binary conflict between those who wanted the cove to remain a sanctuary for seals and those who did not. In a larger sense, it was a multiparty conflict among numerous stakeholders. The conflict impacted livelihoods, property values, and quality of life. A native La Jollan and a community leader grew increasingly concerned about the ongoing conflict among neighbors. The parties to the conflict attempted to solve it through litigation and other adversarial approaches, but none stuck for long. The community leader believed it would prove more productive to initiate a mediation. But in what format?

STRATEGIC MANAGEMENT

- ***Strategic Management***
- *International Entrepreneurship*
- *Digital Strategy*
- *Internationalization*
- *Startup*
- *Scaling Entrepreneurial Ventures*
- *Digital Platform*

Stayfilm: From a Brazilian Digital Startup to a Global Scaleup 79

Fernanda Cahen*, ESPM, Erica Berte, Metropolitan State University and Kay Keels, Coastal Carolina University [1240 Joaquim Tavora St., São Paulo, Brazil 04015-013, fernanda.cahen@espm.br]

Stayfilm is a representative case of a Brazilian digital startup trying to compete and succeed in the global market. In 2016, Stayfilm's application (app), which customers used to convert photos and videos into films, faced a decline in the number of registered users, app downloads, and films produced. After opening some offices overseas, the partners realized that operating a global business in more stable and tech-developed countries would benefit their success; hence, they decided to move the startup headquarters to a different country. By February 2017, they were considering moving Stayfilm's headquarters to London (U.K.), Toronto (CA), or Miami (U.S.). This case asks students to select a city where the company should establish its headquarters based on information provided in the case. The story presents a successful example of an emerging market digital startup attempting to expand globally. The case provides an exciting context for studying digital startups' attributes, business models, and internationalization processes.

NACRA

North American Case Research Association

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.

ISBN 978-1-7377586-6-2
90000
9 781737 758662