

N A C R A



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Nicole M. Amos, VP of Programs & Conference Chair  
Johnson & Wales University, Providence, Rhode Island, USA



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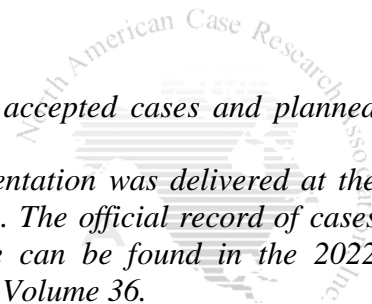
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*This 2022 Program has been compiled using information on accepted cases and planned presentations.*

*This Program document does not confirm that a case or presentation was delivered at the conference, and is not confirmation of conference participation. The official record of cases and presentations delivered at the 2022 NACRA Conference can be found in the 2022 Proceedings of the North American Case Research Association, Volume 36.*



# CASE RESEARCH FOUNDATION

## Paul R. Lawrence Doctoral Student and Early-Career Faculty Fellowship Program

The Case Research Foundation (CRF) promotes awareness, development, and dissemination of case research, writing and teaching through the provision of scholarships, grants, and more. Currently, the major activity of the CRF is administering the Paul R. Lawrence Fellowship Program. This program provides fellowships to doctoral students and faculty in the first three years of a tenure-track or equivalent appointment to be trained in case research, writing, and teaching at the NACRA annual meeting. This is the eighth year of the program's operation. The CRF has now awarded a total of 74 fellowships.

In 2022, the Case Research Foundation awarded fellowships to the following 11 individuals:

Lam An	Canada	University of Winnipeg
Pardeep Singh Attri	India/Hungary	Central European University
Samir Biswas	India	Indian Institute of Management Calcutta
Bingbing Ge	China/United Kingdom	Lancaster University
Seham Ghalwash	Egypt/Denmark	Technical University of Denmark
Viktor Golovii	Ukraine	University of Kyiv
Margot Leger	South Africa/Netherlands	Utrecht University
Saran Nurse	United States	Kean University
Belinda Nwosu	Nigeria	Lagos Business School
Chrissann Ruehle	United States	Florida Gulf Coast University
Juan Velez-Ocampo	Colombia	University of Antioquia

In addition, this year the CRF welcomes to the conference the following members of the 2020 and 2021 cohorts of Paul R. Lawrence Fellows, who have had cases accepted for presentation:

Nidheesh Joseph	India	Indian Institute of Management Tiruchirappalli
Yelena Krupina	Kazakhstan	Turan University
Julie Nelsen	United States	Washington State University Vancouver
Adeniyi Olarewaju	Mexico/Nigeria	Tecnologico de Monterrey
Aditee Prabhakar	India/Kazakhstan	Indian Institute of Engineering Science and Technology Shibpur
Stephanie Raible	United States	University of Delaware
Hossein Rikhtehgar Berenji	Iran/United States	Pacific University

# START-UP CASES WORKSHOP

**Track Co-Chair:** Linda E. Swayne, University of North Carolina Charlotte (emerita)

**Track Co-Chair:** Rebecca J. Morris, Westfield State University

## Mentors

We thank the following Mentors for reading, reviewing, giving feedback and guiding the round table discussions for participants who are learning the art and craft of case writing.

Karen Boroff, Seton Hall University  
 Christopher M. Cassidy, Sam Houston State University  
 Eric Dolansky, Goodman School of Business  
 Janis Gogan, Bentley University  
 Randall D. Harris, Texas A&M University - Corpus Christi  
 Cynthia Ingols, Simmons College (retired)  
 Anne T. Lawrence, San Jose State University (emerita)  
 John Lawrence, University of Idaho  
 Rebecca Morris, Westfield State University  
 Elizabeth Ontaneda, Universidad Peruana de Ciencias Aplicadas  
 Susan Peters, University of North Carolina Pembroke  
 Kathryn S. Savage, Northern Arizona University  
 Ram Subramanian, Stetson University  
 Linda Swayne, University of North Carolina-Charlotte (Emerita)  
 Miriam F. Weismann, Florida International University

Case Author(s)	Start-Up Case Title
Victor Bilodeau	Accounting and the Blockchain
C. Lynn Kendall	Angua'tagan (Something Extra): Addressing Food Security through a Social Enterprise
Sanjeev Ganguly Satyasiba Das	Banka Bioloo Limited: Recognizing and Shaping Opportunities
Kevin Pan Reginald J. Harris	Blolgen's Novel Alzheimer Treatment as a Potential Blockbuster Drug
W. Scott Sherman Randall D. Harris	Boeing 2022: Run to Congress or Redesign?
Daniel Robeson Paul Thorsten Natasha Adams	Common Roots Foundation
Austen Boroff Timothy Lynch Karen Boroff	Creating Organizational Culture: Rapid Army Modernization
Jane Gravill	Dundee Landscaping: Time to Transition to the New Sustainable Liquid De-Icing Model?
Cynthia Ingols	Elizabeth Miller: Assuming the Presidency of Music Together
Margot Leger Philip O'Donnell, Robert Nason	Exploring the Role of Informal Entrepreneurship in a Developing Country

<b>Case Author(s)</b>	<b>Start-Up Case Title</b>
Saran Nurse	Gentrification and 4 Acres: To Pivot or Not to Pivot?
Janis Warner	Going Digital: How Can an Entrepreneur Navigate Technology Selection to Go from Manual to Computerized?
Bingbing Ge	Heatherlea's Exit Dilemma
Samir Biswas	Indian Railways: Capacity Augmentation in Electrical Power Stations
Juan Velez-Ocampo	Is a Big Deal Always Worth It? The Case of New Stetic's New Clients
Sritama Pal Samir Biswas	Kendriya Vidyalaya: Ensuring Continuous Learning through Innovative Responses during COVID-19 Pandemic
Theresa Coates and Janet Bartholow	Living in NFT Inception
Jeannette Eberhard	Mission Survival: Choosing the Best Path Forward for Downtown United Church
Pardeep Singh Attri	Nalanda Academy: Digital Transformation of Social Enterprise
Anna Czeglédi Jane Gravill James Siew	Ontario College in the Midst of Higher Education Industry Disruption: Systems Thinking Approach
Daniel Robeson Paul Thurston	Ordinary Marathoner
Antony R. Fruzzetti	Pricing Ethics in Pharmaceutical Research
Sonia Mehrotra Uday Salunkhe	Randstad India: Leveraging Its Human Forward Brand Promise for Business Growth
Ainurul Rosli Jane Chang Asieh Hosseini-Tabaghdehi	Scale Up or You Are Out! What Does Scaling Up Mean in a Small Business Journey?
Soni Simpson	Sun-Source: A Case Study in Exponential Growth through Leadership Development
Lam An Sylvie Alber	The TOYBOX Education Project: A Case in Social Enterprise Planning
Kristen Regine	Tik Tok... Tell Me without Telling Me, the Impact of Influencers
Umesh Mukhi Renato Guimaraes Ferreira	To Pass or To Fail: The Dilemma of a Professor
Viktor Golovii, Taras Shevchenk	Wines' Money Does Not Smell. . . . Really?
James Siew	Worlds Converging: Sustainable Fashion Meets e-Commerce



# NACRA 2022 ROUNDTABLE SCHEDULE

## Accounting, Finance, and Economics Cases

**Track Chair:** Olga Kandinskaia, Cyprus International Institute of Management

**Co-Chair:** Michele M. McGowan, Kings College

Cases	Authors
Buffaloed or Not? Financing Crops and Cattle	Choudhry Tanveer Shehzad
Sri Lanka: From South Asia's El Dorados to First Asia Pacific Debt Defaulter	Preeta George Monika Gupta
Exchange Rate Crisis of Pakistan	Choudhry Tanveer Shehzad
A Sports Hotel in Surinam?	Wim Westerman
ENGINE Toys in Covid Pandemic: Pivoting to Subscription Box?	Olga Kandinskaia

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**BUFFALOED OR NOT? FINANCING CROPS AND CATTLE**  
Choudhry Tanveer Shehzad, Lahore University of Management Sciences

**Case Objectives and Use**

This case is intended to serve learning objectives related to the complexities and processes involved in analyzing small-scale loans, the structure, and advantages of cooperative societies in agricultural financing and the financial problems of banks and financial institutions with enormous delinquent loans. This case is suitable for executive training and graduate and MBA courses in the areas of financial institutions, financial intermediation, banking, credit analysis, and agricultural markets and their financing.

**Case Synopsis**

The Case focuses on the decision-making processes for small-size loan applications in a provincial cooperative bank operating in a developing country. The positives and negatives of the process can be discussed through the lens of three small-size agricultural loan cases. For the Head of the credit and risk department of the bank, students need to discuss decision-making on these applications. While the non-performing loans of the bank are spiraling out of control, the documentation required by the bank is already enormous. The case also provides the basis for discussion that how loan processes in the agricultural sector can be improved in a developing country to facilitate farmers.



The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note were anonymously peer-reviewed for presentation at the NACRA 2022 Conference, Niagara Falls, Ontario, Canada, October 6-8, 2022. © 2022 by Choudhry Tanveer Shehzad. Contact person: [Choudhry Tanveer Shehzad, Lahore University of Management Sciences, Phase 5, DHA, Lahore, Pakistan, +92-42-35608036, tanveer.shehzad@lums.edu.pk].

## **SRI LANKA: FROM SOUTH ASIA’S EL DORADOS TO FIRST ASIA PACIFIC DEBT DEFAULTER**

Preeta George , S. P. Jain Institute of Management and Research, Mumbai, India  
Monika Gupta, S. P. Jain Institute of Management and Research, Mumbai, India

### **Case Objectives and Use**

The case can be positioned in courses like Macroeconomics, Public Policy, Government and Public Finance, International Economics and Business Environment for MBA, Executive MBA and M.A. Economics students. The objective of the case is to have students a basic understating of the role of saving and investment, fiscal policy measures in stimulating the economy, current account sustainability, public debt sustainability, twin deficits, the vicious cycle of government debt and its impact on the economy.

### **Case Synopsis**

It was a baptism of fire for the newly appointed Prime Minister of Sri Lanka Ranil Wickremesinghe when he found himself leading a struggle to find \$1 million to pay for the import bill of essential items.

In 2022, Sri Lanka faced the worst economic crisis since independence which led to skyrocketing prices, double-digit inflation, more than 100% increases in fuel prices, multi-hour power cuts, depleting foreign exchange reserves, an acute shortage of food and medicines, dramatic collapse in the incomes, mounting government deficits, devastating government policies, record debt defaults and a downgraded currency rating. This is both baffling and disconcerting because Sri Lanka once enjoyed the coveted status of being the fastest growing nation in South Asia with the highest per capita income in the region. It had the highest human capital index among countries in South Asia.

Ranil Wickremesinghe has a mammoth task on his hands. As he traces the factors leading to the crisis, he hopes to bring his country out of this state of anguish through a very carefully crafted plan. The moot question is what exactly would this plan constitute?

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note were anonymously peer reviewed for presentation at the NACRA 2022 Conference, Niagara Falls, Ontario, Canada, October 6-8, 2022. © 2022 by Dr. Preeta George and Dr. Monika Gupta. Contact person: Dr. Monika Gupta, S.P. Jain Institute of Management and Research (SPJIMR), Bhavans Campus, New Dadabhai Rd, Munshi Nagar, Andheri West, Mumbai, Maharashtra 400058, +91 8696165513, [monika.gupta@iiml.ac.in](mailto:monika.gupta@iiml.ac.in).

## **EXCHANGE RATE CRISIS OF PAKISTAN**

Choudhry Tanveer Shehzad, Lahore University of Management Sciences

### **Case Objectives and Use**

The case can be used in courses like Macroeconomics, International/ Global Economics, Government-Business relationships, and Managerial Economics at the graduate level and executive education programs. It provides the students an exposure to critical questions related to exchange rate determination using a real-life exchange rate crisis faced by Pakistan in 2018-2019. Furthermore, it allows students to apply the concepts of Real Effective Exchange Rate, Purchasing Power Parity, and International Fisher Effect.

### **Case Synopsis**

The case is based on the rapid devaluation of the Pakistani rupee in fiscal years 2018-19 and 2019-20. The case follows the events following the first shock devaluation of July 2017, after which the uncertainty in the value of the Pakistani rupee became evident. While the exchange rate regime of the government between 2013 and 2018 is focused upon, the case also presents a historical perspective on Pakistan's exchange rate crisis, exploring key events since the country's inception in 1947. This is followed by a general description of the most predominant exchange rate systems worldwide. The case then shifts the emphasis back onto the exchange rate crisis of 2018-19 to discuss both the causes of the crisis and the effects (both manifested and expected) of a rapidly depreciating Pakistani rupee. The case ends with an overview of the possible options available to the incumbent government of Pakistan to address the exchange rate crisis.

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## **A SPORTS HOTEL IN SURINAM?**

Wim Westerman

### **Case Objectives and Use**

The case is meant for use in upper bachelor and masters courses in (international) finance and economics, as well as professional training sessions in the field.

The case objectives are the following.

- Make use of financial investment selection criteria, including the net present value method, to assess business risks in investment proposals.
- Apply international parity conditions, notably the interest rate parity theorem, to account for foreign exchange risks in investment proposals.
- Study social-economic events, including balance of payment developments, to incorporate country risk effects in investment proposals.
- Understand how the amalgamation of business risks, foreign exchange risks and country risks may affect the feasibility of investment proposals.

### **Synopsis**

This teaching case describes the situation faced by a decision-maker who represents the investment vehicle of an “old money” family. Although the hotel investment proposal he has to judge seems sympathetic, straightforward and with minor money inflows needed, the representative becomes increasingly worried when viewing social-economic events locally in the developing country of Surinam in South America. The case boils down into how foreign exchange rate levels may affect the economic feasibility of the proposal then.

In order to let bygones be bygones, no permission for publication was asked from anyone. Instead, one actual case was taken as a base and two others were mixed with it, in order to disguise actual circumstances. Early 2016 events in Surinam fit in very well though, as do subsequent events in 2020 and 2021. This keeps the case exemplary at the time of writing and helpful to understand comparable situations that students may be confronted with.

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## ENGINE TOYS IN COVID-19 PANDEMIC: PIVOTING TO STEM SUBSCRIPTION BOX?

Olga Kandinskaia, Cyprus International Institute of Management

### Case Objectives and Use

The ENGINO Toys case is designed for MBA and executive levels. While the main exercise in the case requires students to create/use a forecasting financial model and calculate break-even, the case will also expose students to a wide range of strategic issues, including business model innovation and customer-centric approach. Direct-to-consumers subscription models have been a hot topic for the last few years. There are some great strategy cases on this topic such as for example the Dollar Shave Club, which was the Overall Winner at The Case Centre Awards and Competitions 2021. The novelty of the ENGINO Toys case is that it offers an opportunity to bring the hot topic of subscription services to a financial management class - incorporating the customer-centric approach from Marketing into a classical financial planning exercise and discussing how the results of the financial appraisal fit into the overall strategic assessment. This case is ideal to use in such MBA/MSc courses as Financial Management, Managerial Accounting, or Entrepreneurial Finance. The key topics are forecasting, budgeting, and break-even analysis.

In completing this case, the students should be able to:

1. Demonstrate understanding of the customer-centric approach from Marketing to build a revenue forecast for a subscription service
2. Explain the parameters of a financial planning model for a subscription service
3. Compute the accounting break-even point and suggest ways to improve it
4. Demonstrate knowledge and comprehension of both financial and non-financial considerations that would be critical in this decision

The case is accompanied by a template Excel file for students and a solutions Excel file for instructor.

### Case Synopsis

The ENGINO Toys case is a decision-oriented case which is set in Cyprus (EU) at the beginning of the Covid-19 pandemic. The main protagonist is Costas Sisamos, the Founder and Managing Director of ENGINO, Cyprus-based producer of STEM-oriented construction toys. Founded in 2004, the company has a unique patented system of building sets and has won many international awards. In April 2020, Costas Sisamos found himself overwhelmed by the disruptive shock caused by the Covid-19 pandemic: *“How is best to react to this shock? Are the orders from international distributors delayed simply due to the pandemic, or is this an accelerated, yet logical collapse of my current business model?”* Using distributors was a well-established practice in his business, but for over a year now Costas had worried if that was the right business model for the future. These concerns had pushed him to focus on a big dream from long ago – ENGINO franchised stores – and enthusiastically proceed with planning for the flagship store in Limassol, his hometown. His energetic activities had been interrupted by the global pandemic, and now in the lockdown he pondered if it was time to re-configure his whole strategy. His thoughts leapt to the idea of a STEM subscription box which had been in the back of his mind for some time: *“Would this be the right time to pivot to a subscription box? If so, how long would it take for the STEM box project to break-even, and what would be its expected profitability?”* With rapid changes happening in the toys industry, accelerated further by the covid-19 pandemic, Costas felt immense pressure to decide fast.

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## Cases written in Chinese Language

**Track Chair:** William X. Wei, MacEwan University

**Co-Chair:** Jingqin Su, Dalian University of Technology

**Co-Chair:** Haibo Hu, Jiangxi University of Finance and Economics

### Cases

### Authors

大汉三通集团的新业务发展

Dahan Santong Group: New Business Development in  
The E-Commerce Era

zaiyang Xie  
Roger Chen  
Xiaohua Yang  
William Wei

鸿蒙初开：华为公司营建创新生态系统

The Start of Hongmeng: Huawei Established New  
Innovation Eco-System

Haining Wu  
Jie Lei  
Leshang Lu  
Xinran Li  
Jiarui Feng

各美其美，美美与共：吉利收购宝腾的人力资源整合  
之道

Different in Each but Harmony: The Secret of Human  
Resources Integration for Geely to Acquire Proton

zaiyang Xie  
Xinyi Ding  
Mei Wei

澳覓：Y 形策略

Aomi: A “Y” Strategy

Caleb Chen  
William Wei  
Yutan Yang  
Chong Wang  
Chang Lu

质疑中成长的社会企业-水滴公司的独角兽之路

A Social Enterprise that Grows While Being  
Questioned – The Unicorn Road of Waterdrop Inc.

Xiaoxi Chang  
Xue Wang



# DAHAN SANTONG GROUP: NEW BUSINESS DEVELOPMENT IN THE E-COMMERCE ERA

zaiyang Xie, School of Management, Zhejiang University of San Francisco  
Roger Chen, University of San Francisco  
Xiaohua Yang, University of San Francisco  
William Wei, University of MacEwan

## Case Objective and Use

本案例可用于战略管理，电子商务等课程的本科，MBA 和EMBA 学习。针对传统企业的电子商务等新业务开发，战略选择与决策执行话题进行探讨。

## Case Synopsis

大汉公司在短消息服务和数据方面的传统业务已经在中国赢得了成千上万家企业客户，并且自成立以来一直在同行中排名第一。尽管取得了如此成就，但大汉在进入新的电子商务领域时仍然遇到了困难。一方面，新业务的运营模式和知识与大汉传统业务的运营模式和知识大不相同，大汉传统业务更侧重于云通信开发短信和数据业务。另一方面，在 2015 年，企业电子商务还没有完全发展起来。它与主要针对个人客户的传统电子商务有着很大的不同，传统电子商务被称为消费者模式，传统的电子商务主要的参与者有淘宝、京东等。该案例还强调了大汉是如何学会经营电子商务业务的，尤其是它是如何利用现有的资源和能力来发展新业务。首先，我们讨论了大汉的成长抱负及其将传统业务转变为新型电子商务业务的动机。其次，我们解释了大汉是如何探索电子商务业务这一领域的，它在经历了一个尝试和学习的过程后，实现了其企业电子商务模式。第三，我们阐述了大汉如何建立新的企业电子商务业务以及其在利用和共享资源/能力以及跨部门和跨部门协作方面的实践，其中包括“共享在销售和客户联系中的现有资源”、“利用公司的声誉和领导者的社会关系”以及“相互利用：新业务帮助现有业务”。最后，本案例对大汉企业电子商务的未来发展提出了一些潜在的担忧。

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## 鸿蒙初开：华为公司营建创新生态系统

吴海宁，

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**摘要：**在遭受美国政府打压和谷歌公司断供移动服务的背景下，华为公司在手机业务中应用鸿蒙操作系统，与长期占据手机操作系统优势地位的iOS系统和安卓系统展开竞争。鸿蒙操作系统的成败取决于华为能否迅速建立一个跨行业的、独特的创新生态系统。案例描述了华为公司如何定位鸿蒙系统，开放源代码，支持开发者群体，争取国内手机厂商和传统企业的做法。通过案例分析，学员可以理解创新生态系统的内涵，参与生态系统的各类主体怎样合作创造价值，分析华为公司在创新生态系统建设中的关键举措。本案例为有意建立符合自身资源条件的创新生态系统的企业提供经验借鉴。

**关键词：**鸿蒙，操作系统，创新生态系统，开发者，传统企业

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## 各美其美，美美与共：吉利收购宝腾的人力资源整合之道

### 一、教学目的与用途

1. 适用课程：本案例主要适用于《国际人力资源管理》、《跨国公司管理》和《跨文化管理》等课程，也适用于其他与人力资源管理和国际商务相关的管理课程的教学。

2. 适用对象：MBA、EMBA、本科生、硕士生

3. 教学目的：本案例以吉利并购宝腾公司的跨文化人力资源管理为主线，介绍了吉利并购宝腾后面临的整合困境，进而描述了吉利采取的一系列人力资源整合及跨文化整合措施。通过组织学员对本案例的分析与讨论，引导学员系统掌握企业跨国并购中人力资源整合相关理论知识点，帮助提高学员的问题分析能与理论应用能力。总体上，本案例希望学员分析和理解以下方面内容：

- (1) 阐述企业跨国并购中人力资源整合的内涵与重要性。
- (2) 学习运用文化维度理论分析吉利并购后面临的文化差异与整合困境。
- (3) 理解跨文化人力资源整合战略选择的影响因素，归纳总结吉利并购后采取的跨文化人力资源整合措施及实施效果。
- (4) 加深对跨文化整合理论的理解与应用，分析吉利的跨文化整合策略。

### 二、启发思考题!

1. 如何看待吉利的人力资源整合在本次跨国并购及宝腾复兴中的作用？请结合跨国并购人力资源整合的内涵及重要性进行分析。
2. 吉利在人力资源整合过程中遇到哪些文化差异问题？这些差异如何影响并购后人力资源整合效果？
3. 吉利采用了哪种人力资源整合战略？该战略下吉利是如何推进跨文化人力资源管理的？
4. 吉利采取哪些策略促进并购后双方企业的跨文化整合？你从吉利的文化融合理念中受到哪些启发？

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## **AOMI: A “Y” STRATEGY**

Caleb Huanyong Chen, Macau University of Science and Technology

William X. Wei, MacEwan University

Yutan Yang, Macau University of Science and Technology

Chong Wang, Macau University of Science and Technology

Chang Lu, Macau University of Science and Technology

### **Case Objectives and Use**

This case is appropriate for senior undergraduate, MBA or executive students. It can be used in courses or modules in digital marketing, strategic marketing and business management. After studying the case and working on the assignment questions, students will be able to:

Understand contemporary O2O commerce and marketing, including food delivery app, hyperlocal delivery platform, live streaming commerce and O2O supermarket.

- Review a business portfolio and identify potential options for business growth concerning product/market expansion.
- Analyze internal and external factors of an online food delivery platform and evaluate feasibility of alternative strategic initiatives.
- Apply knowledge to conduct strategic decision-making and planning.

### **Case Synopsis**

This case focuses on a decision dilemma faced by Acen Haitao Jiang, the founder and CEO of Aomi. Founded in 2016, Aomi is an online food delivery platform and dominates a market share over 90% at peak in Macao. Nevertheless, Macao is a very small market, with a population of about 680,000 and an area of 32.9 km<sup>2</sup>, and it becomes a bottleneck to Aomi’s growth. Jiang proposes a “Y” strategy, which is composed of three lines of business development: food delivery (i.e., the core business to maintain), plus business diversification (e.g., live streaming commerce and online supermarket) and international expansion to new, larger markets (e.g., Hong Kong). Considering limited resources and potential risks, however, Jiang is struggling between business diversification and market expansion. Next month, 1 June 2022, will mark the 6th anniversary of the company and Jiang must determine a growth strategy before that.

This case can be used to teach the basics of business development and growth strategy with a hyperlocal business model. With regard to the option of diversification, this case illustrates how contemporary digital marketing techniques such as live streaming commerce and O2O retailing may bring new revenues, as well as what challenges to overcome. For the other option, market expansion, new opportunities come with risks as it is unknown whether the tactics will still work in different markets.

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## **A SOCIAL ENTERPRISE THAT GROWS WHILE BEING QUESTIONED—THE UNICORN ROAD OF WATERDROP INC.**

Xiaoxi Chang, China University of Political Science and Law  
Xue Wang, China University of Political Science and Law [student]

### **Case Objectives and Use**

Target Course: For graduate or undergraduate students, this case would be taught in Innovation and Entrepreneurship Course, Social Entrepreneurship Course etc.

Industry: insurance and healthcare service

Data Sources: Library Research Interviews Consulting Personal Experience

The case describes how Waterdrop Inc. developed from providing health insurance system for vulnerable groups to providing universal welfare insurance. Through the improvement of its business model, Waterdrop gradually explored the dual goals of integrating social value and commercial value, and thus walked out a social entrepreneurial path with Waterdrop characteristics.

### **Case Synopsis**

In recent years, social enterprises have become increasingly active around the world, and their innovative business models and management practices have attracted wide attention. Waterdrop Inc., a unicorn enterprise founded in 2016, has successfully achieved its initial public offering after only four years of development. By 2022, waterdrop has served more than 100million users, raising more than 48.4 billion yuan of medical funds for nearly 2.4 million severe patients. The platform business model of "Waterdrop Medical Crowdfunding+Waterdrop Insurance Marketplace+Waterdrop Health+Waterdrop Charity" and its value conversion have also attracted many investors.

This case reviews the entrepreneurial process of Peng Shen, founder of Waterdrop Inc., and analyzes the original intention of Peng Shen's social entrepreneurship, as well as the doubts and challenges that Waterdrop has faced along the way. The public welfare of its "Waterdrop Medical Crowdfunding" is a double-edged sword, which quickly opens the visibility of Waterdrop, meanwhile it also brings big waves of public opinion to Waterdrop. Although Waterdrop has a bumpy road of growth, its original aspiration remains unchanged. The business model of constant "growth" enables it to be quickly favored by capital and grows into a unicorn enterprise. Waterdrop, which has achieved the stage goal of going public in the United States. Continuously, Waterdrop started to explore online + offline integration model. It launched "WE plan" and "ME plan" to provide new impetus for the development of insurance economic business, launched "Waterdrop Medicine"and "Waterdrop Health" businesses to provide a wider range of medical service options for the majority of users, and established Waterdrop insurance community stores to go deep into the community providing professional insurance services for neighborhood residents.

As the founder, Peng Shen has achieving the enterprise mission of "We at Waterdrop aspire to bring insurance and healthcare service to billions through technology". By describing the opportunities, questions and challenges of Waterdrop's social entrepreneurship, the case helps students further understand the concept of social enterprise, the business model of social entrepreneurship and the exploration of future sustainable development.

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**Cases written in French Language**  
**Track Chair:** Christine Kratz, ICN Business School  
**Co-Track Chair:** Sabine Ruaud, EDHEC Business School

<b>Cases</b>	<b>Authors</b>
Famille Michaud Apiculteurs Marque Employeur: Comment Attirer et Didéliser des Collaborateurs à Partir de la Marque Employeur	Jeanine Billet
Mr. Young : l'intelligence Artificielle au Service du Bien-être et de la Santé Mentale de la Communauté Etudiante	Sabrina Hombourger Franck Bares
Ars Curandi	Marc Jauffrit
SeventyOne Percent: From the Beaches to the World Quelle Stratégie de Communication Pour une Marque de Cosmétiques Responsable et Lifestyle ?	Marie-Catherine Mars Victor Mejia
La Boutique de Loulou : Quelle Stratégie Merchandising Pour le Concept Store Ultra Tendance de la Samaritaine?	Sabine Ruaud Margaux Trogneux
Du Commerce Traditionnel au Marketing Digital du Safran Marocain : Le GIE la Maison du Safran à L'épreuve de la Transition	Abdellatif Ait Heda Fatima Ezzahra Ouboutaib Soraya Rechidi Soumiya Mekkaou
Monin : "Avec un Bon Sirop..., on Fait Fortune"	Christine Kratz Jacky Koehl

# **FAMILLE MICHAUD APICULTEURS MARQUE EMPLOYEUR: COMMENT ATTIRER ET DIDELISER DES COLLABORATEURS A PARTIR DE LA MARQUE EMPLOYEUR**

jeanine BILLET, Management, Groupe ESC-PAU Business School

## **Résumé du Cas**

Nous avons vu qu'au cours du temps, l'artisan Yves MICHAUD a créé une entreprise. En quatre générations l'entreprise est devenue leader mondial du miel. Cette spectaculaire réussite s'est émaillée de décisions qui font que le nom de la structure juridique, comme ses pratiques stratégiques et commerciales ont évoluées.

Aujourd'hui (2019), la FAMILLE MICHAUD APICULTEURS est un industriel du conditionnement de produits alimentaires spécialisée dans le miel, et depuis peu dans le sirop d'érable et ce sont les jumelles Marie et Julie Michaud qui sont à la tête de cette entreprise familiale.

L'entreprise Famille Michaud Apiculteurs hérite d'une histoire valorisante, faite de succès économiques, sociaux et Sociétaux.



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**MR. YOUNG: L'INTELLIGENCE ARTIFICIELLE AU SERVICE  
DU BIEN-ÊTRE ET DE LA SANTÉ MENTALE DE LA COMMUNAUTÉ ÉTUDIANTE**  
Sabrina Hombourger, École des sciences de l'administration, TELUQ  
Franck Bares, Entrepreneuriat et innovation, HEC Montreal

**Thèmes abordés**

- Approches entrepreneuriales basées sur la pensée design (ou *Design Thinking*) et le *prototypage* (*preuve de concept*)
- Conception d'une proposition de valeur
- Modèle d'affaires
- Écosystème entrepreneurial et parties-prenantes au projet
- Modèle de communauté et accompagnement de la démarche

**Résumé du cas**

Le cas retrace le parcours des trois entrepreneurs et permet aux étudiants de revisiter les principales étapes de la phase de création/démarrage d'une entreprise (conception de la proposition de valeur, développement de la preuve de concept et élaboration du modèle d'affaires) dans une approche de pensée design (*design thinking*) et de s'approprier deux outils populaires en entrepreneuriat (canevas de la proposition de valeur et du modèle d'affaires). Ils sont ensuite invités à investir le rôle d'une des parties prenantes de l'écosystème entrepreneurial et, à ce titre, doivent construire une cartographie des différentes catégories de parties prenantes ainsi qu'une chronologie de leurs interventions respectives dans l'accompagnement des entrepreneurs. Enfin, sur la base d'une approche en cinq étapes, ils doivent définir un plan d'actions pour initier et mobiliser une communauté autour de la cause de la santé mentale des étudiants.

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# SEVENTYONE PERCENT: FROM THE BEACHES TO THE WORLD

## QUELLE STRATÉGIE DE COMMUNICATION POUR UNE MARQUE DE COSMÉTIQUES RESPONSABLES ET LIFESTYLE?

Marie-Catherine Mars, EDHEC Business School

Victor Mejía, IUT, Laboratoire GRM, Université Côte d'Azur

### Objectifs du Cas et Utilisation Pédagogique

Cette étude de cas place les apprenants en situation quasi-professionnelle, par la confrontation à la complexité de l'orientation stratégique d'une marque établie depuis une dizaine d'années sur son marché.

Les apprenants vont acquérir des compétences en matière de diagnostic d'image de marque (identité, positionnement...) et de développement d'une stratégie de communication pour une entreprise de taille moyenne. À l'issue de l'étude de cas, ils seront capables de traduire une identité de marque en éléments de communication et de suggérer des recommandations stratégiques et opérationnelles en matière de communication. Ils développeront aussi une bonne connaissance de nouvelles formes de communication, telles que la communication sociétale ou les stratégies mises en œuvre par les DNVB (*Digitally Native Vertical Brands*). Ce cas peut servir d'animation (cas « fil rouge ») pour un cours de communication pour amener les apprenants à s'interroger sur la stratégie de communication d'une entreprise et les décisions stratégiques et opérationnelles qui en découlent.

Ce cas s'adresse à des étudiants de formation initiale, en école de commerce ou en université, à un niveau Bachelor ou Master ainsi qu'à des responsables d'entreprise en formation continue qui souhaitent développer leurs compétences en gestion de l'identité de marque et stratégies de communication.

### Résumé du Cas

Le cas se déroule en juin 2022.

SeventyOne Percent est une entreprise indépendante qui produit et distribue des produits cosmétiques de Clean Beauty, comme des produits solaires et des produits de soins pour le corps et le visage. La marque a été fondée en 2009 par Marc Levy et Raphaël Vannier. Dès les débuts, les deux fondateurs ont souhaité développer une marque responsable, éthique et transparente, en proposant des produits solaires efficaces, naturels, eco-friendly et Made in France. Au moment de sa création, les valeurs fondatrices de la marque ont permis à cette dernière d'établir une différenciation claire par rapport à ses concurrents « conventionnels ». Toutefois, ces valeurs sont aujourd'hui de simples prérequis pour les marques et de nombreux concurrents revendiquent des engagements similaires.

L'accélération actuelle de la distribution de la marque et l'intensification de la concurrence en Clean Beauty imposent désormais aux deux fondateurs de réfléchir à la future stratégie de communication intégrée reflétant les valeurs fondatrices de la marque Seventyone Percent. La marque s'est récemment repositionnée pour toucher de plus larges cibles et dans le même temps, les fondateurs ont décidé de s'engager plus fortement, vers une certification B Corp.

À ce jour, la stratégie de communication de la marque reste embryonnaire et surtout basée sur des actions digitales et hors media. Pour Raphaël et Marc, cela n'est plus suffisant pour devenir la marque leader sur le marché des soins et des solaires Clean et responsables. Ils décident donc de retravailler la stratégie de communication de la marque (cibles, objectifs et contenu de communication, stratégie créative et stratégie des moyens) pour permettre à SeventyOne Percent de dominer les vagues de la Clean Beauty en 2023, avec toutefois un budget restreint de 200 000 euros.

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# **LA BOUTIQUE DE LOULOU : QUELLE STRATÉGIE MERCHANDISING POUR LE CONCEPT-STORE ULTRA-TENDANCE DE LA SAMARITAINE?**

Sabine Ruaud - Edhec Business School, Lille, France  
Margaux Trogneux - La Samaritaine, Paris, France

## **Case Objectives and Use**

Toute entreprise, quel que soit son secteur d'activité, doit s'interroger sur le système de distribution qu'elle doit mettre en place pour atteindre ses clients avec la plus grande efficacité. La Boutique de Loulou est un concept-store au sein du grand magasin la Samaritaine qui doit décider des actions de merchandising à mener pour continuer à surprendre durablement le client et à lui apporter un bénéfice réel. Comment évaluer l'agencement commercial d'une enseigne et la mise en valeur de son offre ? Quels sont les axes stratégiques à prioriser pour maintenir un espace commercial attractif, fonctionnel et à valeur ajoutée ?

## **Case Synopsis**

En ce mois de juin 2022, Margaux Trogneux, 25 ans, Senior Merchandising Assistant à la Boutique de Loulou, le concept store ultra-tendance du grand magasin Samaritaine situé en plein cœur de Paris, contemple avec satisfaction la nouvelle théâtralisation haute en couleur de cet espace de vente. Le temps d'un été, il est transformé en station balnéaire inspirée par le design vitaminé des années 1970. « Samaritaine Paris-les-Flots » se veut une expérience physique immersive et dépaysante, pensée aussi pour les réseaux sociaux. Pour autant, Margaux n'a pas le temps de s'octroyer une parenthèse solaire à écouter le chant des cigales et à s'imprégner des effluves du sable chaud. Elle doit contrôler l'efficacité de sa dernière implantation, une marque alimentaire émergente qui commercialise des cookies colorés aux légumes, et pulser davantage encore la dynamique de ces 230 mètres carrés afin que tout un chacun y trouve son bonheur et que personne ne ressorte plus les mains vides !

Sachant toutefois qu'elle est appelée à prendre de nouvelles fonctions dès 2023, elle vous invite à la seconder dans le cadre de ses missions. Elle vous demande de commencer par définir le concept d'enseigne de la Samaritaine. Elle vous confie ensuite la re-implantation de cette jeune marque alimentaire de cookies colorés aux légumes avec l'ajout d'une nouvelle référence. Enfin, elle vous demande d'émettre des pistes d'amélioration concernant l'organisation et la mise en valeur des produits au sein du concept-store afin d'en accroître le chiffre d'affaires. La qualité de votre réflexion et la précision de votre proposition finale seront déterminantes pour obtenir de sa part une recommandation pour une embauche en CDI à l'issue de vos six mois de stage. Vous êtes prêt.e à plonger dans le grand bain de la « Samaritaine Paris-les-Flots » !

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# DU COMMERCE TRADITIONNEL À LA COMMUNICATION DIGITALE SUR LE SAFRAN MAROCAIN: LE GIE LA MAISON DU SAFRAN À L'ÉPREUVE DE LA TRANSITION

Abdellatif Ait Heda, Enseignant ENCG Agadir  
Fatima Azzahra Ouboutaib, docteur en gestion, ENCGA  
Soraya Rechidi, doctorante ENCGA  
Youssef Ganoune, doctorant ENCGA

## Case Objectives and Use

Amener les étudiants à comprendre le mode de fonctionnement des plateformes numériques et des messages en ligne sur les produits de terroir. Il s'agit d'inciter les étudiants à analyser le degré d'implication des internautes vis-à-vis d'un produit de terroir, pour créer un contenu compatible avec le safran pur. Ce contenu est sensé attirer les internautes par l'authenticité, la crédibilité et la confiance et impacter l'intention d'achat.

Analyser les caractéristiques des internautes en fonction des plateformes numériques pour élargir son audience de vente à des clients potentiels et ouvrir de nouveaux canaux qui vont générer davantage de demandes. Il s'agit de mettre en place une approche omni-numérique pour mener à bien une bonne démarche de prospection commerciale.

En tant que futurs marketeurs, les étudiants sont invités à développer des techniques pour gérer l'interaction avec les internautes et les mécanismes de l'eBAO (bouche-à-oreille) et à comprendre les éléments qui influencent la crédibilité et l'utilité perçue des messages. L'étude de cas insiste sur la démarche de gérer sa présence sur le web pour se positionner, développer sa notoriété et gagner en terme d'engagement internaute (user).

## Synopsis

Au Maroc, le marché du safran est dominé par la fraude et les courtiers qui monopolisent le commerce et lèsent les producteurs et les coopératives. Le Groupement d'Intérêt Economique (GIE) la Maison du Safran a été créé en 2011, pour commercialiser 1000 kg (le 1/3 de la production totale du Maroc) du safran produit annuellement par 25 coopératives (1500 producteurs) de la Région de Taliouine du sud du Maroc. Après 5 années à la direction commerciale du GIE, Ismail Boukharis réalise que sa stratégie marketing traditionnelle basée sur la prospection téléphonique, les relations publiques, les expositions commerciales devient de moins en moins productive, car elle réalise 15 à 20 % du safran commercialisé, tout en restant extrêmement coûteuse. Conscient que les plateformes numériques et les messages en ligne sont devenus des canaux de communication et d'échanges à coût faible très influents, Ismail Boukharis décide de se tourner vers le commerce électronique et entreprend de mettre en place une stratégie du marketing digital. Il se pose la question de la conception du contenu du site web du GIE et de la page à diffuser sur les plateformes numériques ainsi que la stratégie de leur animation. Par ailleurs, des études sur le safran ont démontré que le consommateur marocain ne perçoit pas encore ni les coopératives comme espace légitime de la commercialisation du safran, ni les labels comme critère déterminant de la qualité. Pour Ismail Boukharis, le community manager, le dispositif numérique nécessite une démarche innovante et créative dédiée à un produit authentique et patrimonial. Le contenu à concevoir doit informer, communiquer et surtout crédibiliser le circuit formel de la marque la Maison du safran.

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## MONIN : AVEC UN BON SIROP... ON FAIT FORTUNE

Jacky Koehl, ICN Business School (France)  
Christine Kratz, ICN Business School (France)

### Objectifs du cas et utilisation

Ce cas a l'avantage de mettre les étudiants en situation, dans un contexte professionnel, avec des données réelles. Il met l'étudiant dans la position d'une équipe de direction qui réfléchit à sa stratégie en matière de développement de marques et de portefeuille produits et qui doit faire des choix pour que l'entreprise reste compétitive sur son marché et qu'elle réponde aux attentes des acheteurs.

La présente étude de cas est appropriée dans un cours de stratégie (diagnostic stratégique, lancement d'activités sur un nouveau marché), ou un cours de marketing de gestion de la marque ou peut être utilisée plus globalement sur une thématique de management de l'offre commerciale. Elle s'adresse à un public d'étudiants de premier cycle ou à un public de formation continue (les deux cas de figure ont été testés).

**Les objectifs pédagogiques** visent à développer tant l'esprit d'analyse que la créativité des étudiants. Il s'agit de :

- Maîtriser le diagnostic marketing et les différents outils ;
- Appréhender la cohérence entre l'élaboration d'un diagnostic et les recommandations ;
- Formuler des recommandations stratégiques.

### Résumé et problématique du cas

Depuis trois générations, la famille Monin a construit une marque forte, présente en France et dans le monde avec plus de plus de 150 références : des sirops, des liqueurs, des sauces culinaires, des mix aux fruits et des préparations pour cocktail. Monin se présente comme « la marque de choix des professionnels de la boisson, des baristi dans les coffee shops aux créateurs de cocktails haut de gamme ». Le rachat de la Maison Guiot lui a permis d'être présent sur le marché de la grande distribution.

Juin 2022. Dans un contexte fortement concurrentiel et de nouvelles attentes des consommateurs, et face à une période post-covid qui a eu des conséquences importantes sur le marché des sirops, l'entreprise rencontre de nouveaux enjeux. Le PDG actuel, Olivier Monin, souhaite que l'entreprise soit reconnue comme une marque proposant une gamme de produits et de parfums innovants, de grande qualité. Sa stratégie est claire : pour se développer, ils doivent rester à l'écoute du marché, et recruter de nouveaux clients. Il est important qu'ils vivent une véritable expérience, en consommant les produits de l'entreprise.

Après l'analyse du marché et le diagnostic de l'entreprise, des questions se posent : Quelle stratégie marketing choisir ? Quelle gamme de produits et de services lancer ?

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note were anonymously peer reviewed for presentation at the NACRA 2022 Conference, Niagara Falls, Ontario, Canada, October 6-8, 2022. © 2022 by Christine Kratz and Jacky Koehl. Contact person: [Christine Kratz, ICN Business School, 86, rue du Sergent Blandan, FR-54003 Nancy Cedex, +33 (0)3 54 50 25 04; christine.kratz@icn-artem.com.

**Cases written in Portuguese Language**  
**Track Chair:** Erica Berte, Metropolitan State University  
**Co-Chair:** Tania Casado, University of São Paulo

<b>Cases</b>	<b>Authors</b>
O Dilema De Ronan: Tocar ou Programar?	Mariana Bergsten Mendes Felix Tania Casado Sofia Luchesi Mourão Nogueira
A Mudança Como A Única Constante: A Carreira Executiva De Um Jovem Alemão	Humberta Karinne Da Conceicao Flávia Regina Czarneski Liliana Vasconcellos Sofia Luchesi Mourão
Nadar, Nadar e Morrer na Praia!	Edy Lawson Silva Santos <b>Error!</b> <b>Bookmark not defined.</b> Maressa D'Paula Gonçalves Rosa Nogueira Tania Casado
Guerreiro Espiritual: Busca de Sentido	Desirée Gonçalves Pereira Caroline Kurowski Rodrigues Edy Lawson Silva Santos
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Espelho, Espelho Meu	Edy Lawson Silva Santos Juliana Estácio Rios
Danilo A. / Lebelo	Felipe Teixeira Genta Maragni Fábio Gaglian Camargo Edy Lawson Silva Santos

## **O DILEMA DE RONAN: TOCAR OU PROGRAMAR?**

Mariana Bergsten Mendes Felix, FEA-USP

Sofia Luchesi Mourão Nogueira, FEA-USP

Tania Casado, FEA-USP

### **Objetivos do Caso e Uso**

O caso foi desenvolvido para ser abordado no início da disciplina de Gestão de Carreiras em programas de graduação ou pós-graduação com o objetivo de introduzir aos alunos conceitos fundamentais para se compreender o tema carreira.

A trajetória de Ronan levará o aluno a entender o que o motivou a fazer suas escolhas de carreira trazendo à tona a importância do autoconhecimento para o planejamento e autogerenciamento da carreira.

O caso está dividido em duas partes. No caso A, os objetivos são: diferenciar escolhas baseadas em critérios objetivos e subjetivos de carreira; e ressaltar a importância do autoconhecimento e da reflexão para escolhas assertivas de carreira, baseadas em valores individuais e não em critérios externos. No caso B, os seguintes objetivos de aprendizagem podem ser atingidos analisando a nova fase da trajetória do protagonista: conceituar o termo carreira, diferenciar os conceitos de carreira tradicional versus carreira proteana; e conceituar e caracterizar a carreira proteana.

### **Sinopse do Caso**

No caso A, Ronan Morris, um músico erudito, tocava trompete, e desde que iniciou os estudos, se destacou entre os colegas e foi reconhecido no meio musical. Foi cursar graduação de música na Alemanha, teve algumas dificuldades com a técnica do instrumento, e passou alguns anos prestando concursos, buscando uma vaga em alguma das principais orquestras alemãs. Sem conseguir uma evolução técnica satisfatória no instrumento, mesmo após anos de estudos e mentorias, com um ritmo de trabalho intenso, orçamento curto e sem ter tempo disponível para a esposa, Ronan começou a questionar suas escolhas. Após alguns anos, Ronan percebeu que a música talvez não fosse a melhor escolha para seu momento de vida e passou a pensar em outras possibilidades. Uma delas era a área de TI, e ele ficou sabendo de uma vaga indicada por um amigo. No início de 2019, Ronan precisava decidir entre o campo da música, que já conhecia e se dedicava há mais de dez anos, e o da tecnologia, que conhecia muito pouco e não possuía experiência, mas que parecia promissor.

No caso B, Ronan se deu conta que a música talvez não fosse a melhor escolha para seu momento de vida, começou a pensar em outras possibilidades e fez uma transição para a área de TI ao perceber a crescente demanda de mão de obra nesse segmento e após conhecer a rotina de um amigo que atuava na área. Após três anos e meio de dedicação na programação, atuando com destaque em duas empresas, Ronan começou a sentir saudades da música, refletir sobre as suas escolhas de carreira e precisava decidir se faria uma mudança para uma nova empresa mais próxima da música, uma startup de um software de partituras, ou se continuaria na empresa atual onde possuía grandes chances de assumir um cargo de liderança.

Os autores desenvolveram o caso para discussão em classe e não para ilustrar uma resolução efetiva ou não efetiva para a situação. O caso e as notas de ensino foram revisados anonimamente para a apresentação na NACRA 2022 Conference, Niagara Falls, Ontario, Canada, 6-8 de Outubro 2022. © 2022 por Mariana Bergsten Mendes Felix, Sofia Luchesi e Tania Casado. Contato: Mariana Bergsten Mendes Felix, FEA-USP, end: Av. Professor Luciano Gualberto, 908, São Paulo SP, Brasil; tel: 5511 99539-2555; e-mail: [marianabergsten@hotmail.com](mailto:marianabergsten@hotmail.com)

## **A MUDANÇA COMO A ÚNICA CONSTANTE: A CARREIRA EXECUTIVA DE UM JOVEM ALEMÃO**

Humberta Karinne Da Conceição Santos Silva, FEA – USP [student]

Flávia Regina Czarneski, FEA – USP [student]

Liliana Vasconcellos, Faculty of Economics, FEA – USP

Sofia Luchesi Mourão Nogueira, FEA – USP [student]

### **Objetivos e Uso do Caso**

O cenário destaca como as relações culturais influenciam no ambiente de trabalho e na carreira, assim como os desafios enfrentados pelos executivos para construir trajetórias internacionalistas e as decisões tomadas ao longo desse caminho.

Este caso é recomendado a estudantes de graduação, pós-graduação e programas executivos (MBA), com o objetivo de ilustrar as teorias relacionadas à cultura nacional e aos valores pessoais na carreira.

### **Sinopse do Caso**

Este caso visa elucidar os desafios de construir uma carreira em diferentes contextos, uma vez que há aspectos culturais que são visíveis, a exemplo do idioma, vestimenta, estilo de vida, hábitos alimentares e há aspectos invisíveis, como os valores sociais e morais, códigos não verbais, concepções de passado e futuro e questões éticas e comportamentais.

A primeira parte do artigo apresenta o dilema enfrentado por um executivo alemão, Thomas Müller, no contexto socioeconômico latino-americano, seguido de uma breve descrição sobre os diferentes contextos culturais por onde ele transitou até sua chegada ao México.

Thomas Müller é um alto executivo alemão que trabalha para uma das maiores empresas de logística do mundo, a *Logistik Company*, na qual aproveita as oportunidades que o cenário proporcionou. Ao longo de seus onze anos na empresa, ele mudou de posição e de país para garantir a empregabilidade. Entretanto, quando seu plano de tirar um ano sabático em março de 2022, previamente acordado com a empresa, não se concretiza, e ele deve tomar uma decisão:

a) continua a trabalhar na empresa?

OU

b) simplesmente renuncia à empresa Logistik e procura outro caminho?

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## **NADAR, NADAR E MORRER NA PRAIA!?! CASO DE ENSINO AKIRA KATO**

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Tania Casado, FEA/USP

### **Case Objectives and Use**

Esse caso de ensino tem como objetivo compreender escolhas e mudanças de Carreira a partir da compreensão do dilema enfrentando por atletas e outros profissionais com Carreiras de ciclos curtos que precisam mudar e identificar outras áreas de atuação ainda muito jovens. Além do uso no esporte e em outras carreiras de ciclos curtos o estudo desse caso busca incentivar a reflexão de escolha de carreira e trajetória por profissionais de outras áreas. Este caso de ensino é indicado para ser utilizado em disciplinas (Graduação e Pós-graduação) ou em cursos técnicos e treinamentos em espaços que discutam Carreira. Para profissionais de Educação Física e áreas a fins esse caso pode favorecer a reflexão sobre o planejamento de carreira tendo em vista a aposentadoria de competições que tem uma idade bastante reduzida. Para gestores e profissionais de Administração esse estudo revela a dinâmica da carreira no esporte contribuindo para que o profissional tenha uma maior amplitude em termos de dilemas e desafios no planejamento de Carreiras.

### **Case Synopsis**

Apesar de uma trajetória de sucesso em sua carreira como atleta da natação em piscinas, Akira passa agora por um momento de grande crise profissional. Ela saiu das provas em piscina e enfrentou seu medo de águas abertas passando a disputar provas de maratona aquática acompanhada e incentivada por seu treinador e marido. A maratona aquática virou modalidade olímpica o que se apresenta como oportunidade para representar o Brasil e conseguir uma medalha olímpica. No entanto, em uma das competições Akira teve o tímpano perfurado e abandonou a prova olímpica de 2012 que disputou em virtude de hipotermia. Aos 29 anos de idade ela já era considerada velha para as competições e recebeu pressões da imprensa e de profissionais do esporte de que chegara o momento para abandonar as competições. Neste mesmo tempo observa a grande chance dos patrocínios e incentivos minguaem depois de tantos percalços. Esse seria o momento de deixar as competições? O que Akira deveria fazer?

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**GUERREIRO ESPIRITUAL: BUSCA DE SENTIDO**  
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Caroline Kurowski, Rodrigues, Universidade de São Paulo  
Edy-Lawson, Silva Santos, Universidade de São Paulo

**Objetivos e uso do caso**

Este caso visa proporcionar uma reflexão sobre a história e carreira de um líder espiritual apresentando e correlacionando com os conceitos da jornada do herói. O caso é indicado para cursos de graduação, pós-graduação e executivos em disciplinas que abordem conteúdos e conceitos de comportamento e carreira.

Os objetivos são:

- Proporcionar uma reflexão sobre a história e carreira de um líder acadêmico e espiritual
- Apresentar os conceitos da jornada do herói
- Permitir a análise das fases da jornada do herói por meio da leitura e debate de um caso real
- Permitir a identificação dos principais elementos que compõem a jornada do herói

**Sinopse do caso**

O caso Guerreiro Espiritual: busca de sentido aborda a história pessoal e profissional de um líder espiritual e os conceitos da Jornada do Herói. O protagonista, Hridayananda Das Goswami, é um homem que, em pouco tempo, se tornou um mestre espiritual com a desafiadora missão de abrir templos Hare Krishna na América do Sul, enfrentando oposição dentro do movimento global, o que o colocou diante do dilema de criar, ou não, um projeto para salvar o movimento espiritual no Ocidente, iniciado por seu mestre. A trajetória de Hridayananda nos permite estudar a figura e a Jornada do Herói, em todas as suas fases, desde sua saída do mundo comum, entrando em um mundo especial e retornando para compartilhar seu aprendizado com a sociedade.

Howard J. Resnick, que desde jovem teve excelente desempenho acadêmico, conheceu, no campus universitário, Bhaktivedanta Swami Prabhupada, fundador da ISKCON, que mais tarde se tornaria seu mestre. Ao entrar em contato com a filosofia do Yoga, Resnick deixou seu status de estudante universitário para se dedicar à missão de estabelecer a filosofia do bhakti yoga no Ocidente e tornou-se Hridayananda Das Goswami. Após algumas batalhas como líder espiritual, Hridayananda retornou à universidade, formou-se em sociologia pela UCLA e depois obteve um doutorado em Ciências da Religião pela Universidade de Harvard. Convencido de que Bhakti Yoga era uma ciência espiritual, Hridayananda percebeu que esta era a maneira de salvar o movimento no qual ele havia se tornado o líder. Assim, para salvar a Sociedade Internacional para a Consciência de Krishna (ISKCON) e continuar sua missão religiosa, Hridayananda pensou em criar uma versão ocidentalizada do movimento originado na Índia. No entanto, ele sabia que essa decisão traria sacrifícios e conflitos. Caminhando pela praia, Hridayananda parecia ter chegado a uma decisão.

A trajetória de Howard J. Resnick nos permite estudar a figura do herói, alguém que realizou algo que vai além da esfera ordinária da experiência, saindo do mundo comum, entrando em um mundo especial e voltando para compartilhar seus aprendizados com a sociedade, passando, naturalmente, para desafios e provações.

The authors developed the article to propose future directions and evolution of Case Method of Teaching. The article was anonymously peer reviewed for presentation at the NACRA 2022 Conference, Niagara Falls, Ontario, Canada, October 6-8, 2022. © 2022 by Desirée Gonçalves Pereira, Caroline Kurowski Rodrigues, Edy-Lawson Silva Santo. Contact person: Desirée Gonçalves Pereira, Universidade de São Paulo, Av. Prof. Luciano Gualberto, 908 - Butantã, São Paulo - SP, 05508-010, (+55 21981650057, [desiree.gpereira@usp.br](mailto:desiree.gpereira@usp.br))



**NA ROTA DO SOL**  
Eveline, Iannarelli, FEA-USP  
Tania Casado, FEA-USP

**Objetivo do caso e uso**

Este caso de ensino pode ser aplicado em cursos de graduação, pós-graduação e especialização; nas áreas de Administração, Gerontologia e Psicologia, em disciplinas de Relações de Trabalho e Envelhecimento, Carreiras Contemporâneas, Planejamento e Gestão de Carreira com foco no indivíduo.

**Objetivos de Aprendizagem**

1. Identificar os diferentes motivadores determinantes de tomadas de decisão de carreira.
2. Relacionar o modelo de ciclo de vida de Donald Super ao processo de tomada de decisão de carreira.
3. Analisar o modelo de ciclo de vida de Donald Super como motivadores determinantes de tomada de decisão de carreira na atualidade.

**Sinopse do Caso**

O caso conta a história da trajetória de carreira de Aurora. Às vésperas de completar 60 anos de idade, a protagonista, casada, mãe de dois filhos, realizava consultoria independente com foco no desenvolvimento humano, uma atividade que estava totalmente alinhada aos seus valores e momento de vida.

Com uma carreira mais autônoma, após 28 anos no mundo corporativo, planejava poder trabalhar de qualquer lugar e graças a essa maior mobilidade, retomar as viagens que tanto gostava de fazer junto com seu marido. Conciliar trabalho e qualidade de vida era seu principal projeto.

Ao longo de sua história podemos observar a transformação da dimensão do trabalho na vida de Aurora. Durante sua trajetória a protagonista busca espaço para se reposicionar como profissional da área de Recursos Humanos, investindo no autodesenvolvimento para alcançar seus objetivos. Mesmo aposentada, Aurora mantém o interesse e a dedicação nas atividades profissionais, porém cada vez mais em busca de um melhor equilíbrio entre vida pessoal e profissional. Foi então que surge a possibilidade da mudança para uma cidade litorânea, projeto de vida de Aurora e Lucas, mas que poderia afetar a trajetória profissional de Aurora.

Os autores desenvolveram o caso para discussão em classe e não para ilustrar uma resolução efetiva ou não efetiva para a situação. O caso e as notas de ensino foram revisados anonimamente para a apresentação na NACRA 2022 Conference, Niagara Falls, Ontario, Canada, 6-8 de Outubro 2022. © 2022 por Eveline Iannarelli e Tania Casado. Contato: Eveline Iannarelli, FEA-USP, end: Av. Professor Luciano Gualberto, 908, São Paulo SP, Brasil; tel: 5511 983505450; e-mail: [Eveline.iannarelli@usp.br](mailto:Eveline.iannarelli@usp.br)

## **CASO AMANDA LOREIRO**

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Juliana Estácio Rios, Universidade de São Paulo

### **Case objectives and use**

Esse caso de ensino tem como objetivo refletir sobre as escolhas e mudanças de carreira, a partir dos contextos vividos pela protagonista. O caso levanta o seguinte dilema: seguir a carreira na diplomacia no Canadá ou permanecer no Brasil desenvolvendo um outro trabalho? Os objetivos pedagógicos desse caso são analisar carreira sem fronteira, promover a reflexão sobre o protagonismo na carreira e a relação entre a história de vida e as escolhas na carreira. Dessa forma, este caso pode ser aplicado em cursos de graduação e pós-graduação de qualquer área que pretenda discutir a dinâmica da Carreira Sem Fronteira. Além da contribuição pedagógica e reflexão sobre conceitos ligados à carreira e o protagonismo do sujeito sobre ela, esse caso é indicado para auxiliar alunos na compreensão de que carreira não precisa ser algo rígido e linear.

Palavras-chave: Carreira; Carreira sem fronteira; Carreira com Propósito.

### **Case synopsis**

A personagem protagonista desse caso é Amanda Loreiro, consulesa da França, que reside no Brasil. Filha de uma francesa e um gambiano, Amanda nasceu na periferia de Paris, enfrentando diversos desafios ao longo de sua vida. Como única negra em sua casa, Amanda conviveu com o racismo desde muito nova. Crescida na linguagem do “saber se virar”, Amanda trocou de casas e colégios diversas vezes. No último ano da escola resolveu ser *au pair* na Alemanha, Inglaterra e EUA e essa experiência abriu um novo mundo para ela. Conviver com pessoas ricas e famosas, proporcionou contato uma cultura que ela desconhecia e Amanda descobriu que queria aquela “vida de princesa” para si. Ao longo de sua vida, Amanda teve diversas experiências profissionais e morou em 8 países diferentes. Foi cantora e jornalista. Nesta última profissão conheceu seu marido, que veio a ser cônsul da França no Brasil. A vida diplomática trouxeram outros prazeres e desafios para Amanda, que alcançara sua tão sonhada “vida de princesa”. No Brasil, Amanda gerou seu primeiro e único filho. Aqui, ela teve a oportunidade de palestrar sobre racismo e dar consultoria em grandes empresas sobre empoderamento feminino. Amanda está muito feliz, pois encontrou propósito em sua carreira. Quatro anos depois de sua chegada ao Brasil, seu marido é chamado para ser cônsul no Canadá. Ambos estão apaixonados pelo país, mas receosos em permanecer sem a vida diplomática.

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## **DANILO A. / LEBELO**

Felipe Maragni, Universidade de São Paulo [estudante autor]  
Fábio Camargo, Universidade de São Paulo [estudante autor]  
Edy-Lawson Santos, Universidade de São Paulo [estudante autor]

### **Objetivos e Usos do Caso**

Este é um caso que pode ser aplicado em cursos de graduação e pós-graduação em administração ou áreas correlatas. Mais especificamente, em disciplinas relacionadas ao estudo de carreiras, de tomada de decisões, e de gerenciamento de recursos humanos. O tópico principal aqui abordado é o de carreira objetiva *versus* carreira subjetiva – que em geral aparece no começo das disciplinas de carreira –, mas também pode ser usado para tratar de carreira proteana e de carreira sem fronteiras.

### **Sinopse do Caso**

O caso representa o dilema de Danilo, um Engenheiro Químico com experiência internacional na Lebelo, uma grande multinacional francesa, na área de Pesquisa e Desenvolvimento. Ainda que o trabalho lhe desse grandes desafios e a oportunidade de crescimento profissional, Danilo sentia-se pressionado com as condições de trabalho às quais é submetido, além de que se enxergava sem perspectivas, entendendo que esta carreira não é a que lhe trazia felicidade e realizações.

Danilo é um Engenheiro Químico com formação internacional. Possui os diplomas de Engenharia da Escola Politécnica da Universidade de São Paulo, no Brasil, e da Ecole Supérieure de Chimie de Paris, na França. Possui uma relação longa com a empresa em que trabalhava, começando como estagiário de laboratório e alcançando o cargo de gerente no mais importante laboratório de pesquisa da empresa no Brasil, lidando com xampus (o carro-chefe da Lebelo).

A organização foi responsável por financiar parte de seus estudos na França entre 2005 e 2006. Após um período de estágio no fim do curso de graduação, Danilo foi efetivado na empresa em 2007, onde seguiu até 2017. Ainda que viesse recebendo cada vez mais desafios, oportunidades de trabalho internacionais e progressão hierárquica e financeira, Danilo não se sentia realizado, entendendo que o seu trabalho não lhe causa satisfação. A rotina de trabalho lhe cansava, o mundo dos cosméticos lhe soava predatório e consumista, e os relacionamentos interpessoais com colegas pareciam ser apenas de fachada.

Em 2014, Danilo iniciou uma segunda graduação em Letras, em formato à distância, e a concluiu em 2017. Estando prestes a se formar, recebeu o convite para iniciar um mestrado em Linguística Computacional na Sorbonne, uma das maiores e melhores universidades da França. Mas aceitar a proposta significaria deixar a empresa onde havia desenvolvido toda a sua experiência profissional, para iniciar uma nova carreira na área de Letras.

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**Cases written in Russian Language**  
**Track Co-Chair:** Madina Subalova, Narxoz University  
**Track Co-Chair:** Aigerim Raimzhanova, Narxoz University

Cases	Authors
<p>Особенности управления франчайзинговой сетью на примере компании «Додо Пицца»  Features of the Franchise Network Management on the Example of The “Dodo Pizza” Company</p>	Alima Buganova
<p>Трансформация: путь от базара до запуска завода  Transformation Process from the Bazaar to the Launch of the Plant</p>	Bermet Talasbek kyzy Urmat Ryskulov Talant Asan uulu Bermet Akunova
<p>Становление рынка блокчейн технологий в развивающейся экономике: путь «Архикоина» в Кыргызстане  The Formation of the Blockchain Technology Market in a Developing Economy: the Path of the "Archcoin" in Kyrgyzstan</p>	Saikal Anvar kyzy
<p>Хватит следовать стереотипам – Театр Artishock на пути к своей основной компетенции  Not Following the Stereotypes Anymore – Artishock Theater Is on the Way to Its Core Competence</p>	Kristina Ryabova
<p>Путь креативных предпринимателей: меньше страхов, больше любви  The Path of Creative Entrepreneurs: Less Fear, More Love</p>	Talant Asan uulu Urmat Ruskulov Begimai Abdraeva Bermet Talasbek kyzy Aruuke Bekzat kyzy
<p>И целого мира мало: путь интернационализации компании Шоро  The World is Not Enough: The Internationalization of the Shoro Company</p>	Saikal Anvar kyzy Talant Asan uulu Natalia Korosteleva
<p>Дилемма GLOVO по выходу на казахстанский рынок  GLOVO's Dilemma on Entering the Kazakhstani Market</p>	Yelena Krupina Kristina Moreva



## ДИЛЕММА GLOVO ПО ВЫХОДУ НА КАЗАСТАНСКИЙ РЫНОК

Елена Крупина, Университет Туран  
Кристина Морева, Университет Нархоз  
Anjan Ghosh, Университет Нархоз

### Цели кейса

Основная цель этого кейса - научить студентов понимать корпоративную динамику по стратегии интернационализации и ее реализации. В частности, кейс помогает обучающимся:

- 1) Применять основные инструменты стратегического управления для проведения анализа организации и окружающей ее среды.
- 2) Разработать структурированный подход к принятию решений для интернационализации.
- 3) Мыслить творчески — сочетать причинно-следственные и следственные рассуждения.

### Аннотация

Служба доставки Glovo была запущена в 2015 году Оскаром Пьером и Сашей Мишо, которые вдохновились бизнес-моделями Uber и Airbnb. Они оба с самого начала видели в Glovo международную компанию и использовали английский как первый язык, хотя компания была основана в Испании. Необходимость быстрого роста обосновывалась также экономией при увеличении масштабов и общими рыночными ожиданиями, что рынки еды и услуг по доставке вырастут в 4 раза к 2025 году. Рост стал возможен потому, что люди будут тратить меньше времени на приготовление пищи, требовать больше свободы и удобства, что привело бы их к миграции в онлайн. В среднем Glovo открывался в новом городе каждые 4 дня, а к концу 2018 года он был представлен в Южной и Центральной Америке, Юго-Западной Европе, Восточной Европе и Африке, и в компании работало более 1300 человек по всему миру. Во второй половине 2018 года команда Glovo проводила анализ рынка Центральной Азии, где уровень проникновения смартфонов и интернета становился все выше. Кроме того, там не было или было несколько слабых игроков доставки, которые были основаны локально и не имели ресурсов, которые были у Glovo. С одной стороны, этот рынок казался подходящим для Glovo, однако, с другой стороны, здесь могло бы быть несколько проблем, таких как климат и язык.

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## Cases written in Spanish Language

**Track Chair:** Josep Lluís Cano Giner, ESADE Business School (Ramon Llull University)

**Co-Chair:** Josep M<sup>a</sup> Sayeras, ESADE Business School, (Ramon Llull University)

Caso Lékué

Josep Lluís Cano Giner

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## CASO “LÉKUÉ”

Josep Lluís Cano Giner, ESADE Business School (Ramon Llull University)

### Case Objectives and Use

Los objetivos del caso se pueden dividir en generales y específicos:

#### *General:*

- Comprender el valor que aporta la asistencia a una feria comercial.
- Formular la estrategia de digitalización en el ámbito B2B.

#### *Específicos:*

- Identificar las actividades que se realizan en una feria comercial.
- Proponer qué actividades son digitalizables y comprender sus limitaciones.
- Definir cómo se pueden digitalizar.

El caso “Lékué” se ha diseñado para ser utilizado en cursos de marketing, comercialización o transformación digital. La COVID-19 lamentablemente se ha convertido en el mayor acelerador de la digitalización de las organizaciones. El caso plantea la necesidad de sustituir la asistencia a una feria comercial por la construcción de un *showroom* digital, pero también podría convivir, una vez desarrollado, con las actividades del mundo *offline*.

El caso puede dirigirse a diversas audiencias. Puede utilizarse con alumnos de pregrado en cursos de emprendimiento o marketing, o de MBA con distintos perfiles y años de experiencia (a tiempo completo, a tiempo parcial o en formatos *Executive MBA*), y en programas ejecutivos, tanto abiertos como *In-Company Training* (ICT).

### Case Synopsis

Rafael Sebastián, director general de Lékué, tenía una reunión virtual con parte de su equipo directo local y parte del equipo que se había unido desde la distribuidora que tenían en Delaware (Estados Unidos) y desde la fábrica de Suzhou (China). Lékué diseñaba soluciones únicas y eficaces, *gadgets* y utensilios que habían cambiado la forma de cocinar tradicional. La pandemia de la COVID-19 no les permitía asistir a la feria AMBIENTE el próximo febrero de 2021 en Frankfurt (Alemania), donde presentaban las novedades de Lékué a sus principales distribuidores internacionales. Habían de tomar una decisión, si no podían ir a la feria. ¿Podrían sustituirla por un *showroom* digital?

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# Corporate Governance and Ethics Cases

**Track Chair:** Vijaya Zinnoury, University of Denver

**Co-Chair:** Theresa Coates, Limestone College

Cases	Authors
Racism off the court: A team owner out of bounds in the NBA	Prescott C. Ensign Jacopo Ghezzi
Serving with Pride	Destynie Sewell
The American Contract Bridge League Confronts an Epidemic of Cheating	Janis Gogan Ashok Rao
Caged or Cage-Free?	Karen E. Boroff Karen Meleta Paula Alexander

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## **RACISM OFF THE COURT: A TEAM OWNER OUT OF BOUNDS IN THE NBA**

Jacopo Ghezzi, IKEA Social Entrepreneurship Malmö, Sweden  
Prescott C. Ensign, Lazaridis School of Business & Economics, Waterloo, Ontario Canada

### **Case Objective and Use**

The audience will learn more about the controversial comments made by Donald Sterling and will consider the situation Adam Silver had to deal with in 2014, with all the details from the case. Furthermore, they will also have the opportunity to understand the role and the impact that public opinion and sponsors usually have on companies and organizations.

### **Case Synopsis**

Donald Sterling is the owner of the Los Angeles Clippers, a team which plays in the National Basketball Association (NBA). In April 2014, TMZ Sports published an audio recording between Sterling and his mistress V. Stiviano; the phone call, which was viewed as racist, was immediately condemned by the NBA community and by some great personalities, such as US President, Barack Obama. The NBA, represented by its Commissioner Adam Silver, promptly reacted, with the virtual stripping of the team and the highest possible fine to Sterling. The Los Angeles Clippers were then sold to ex-CEO of Microsoft, Steve Ballmer, for \$2 billion by Sterling's wife Shelly Sterling.

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**SERVING WITH PRIDE:  
A BUSINESS CASE STUDY ON ADDRESSING CONFLICTING INTERNAL CODES OF  
ETHICS WHEN SERVING THE LGBTQ+ COMMUNITY**

Destynie Sewell, J.D., MBA, University of Nebraska Omaha

**Case Objectives and Use**

The case is designed to be completed in one 45 minute, in-class discussion. While in-person discussions are ideal, the case can easily be done via synchronous and asynchronous online course delivery. The information provided will aid students in meeting the following objectives:

1. Distinguish between “law” and “ethics”.
2. Analyze applicable federal, state, and case law.
3. Examine conflicts with codes of ethics and societal values.
4. Identify policies or actions that run contrary to laws or codes of ethics.
5. Explore actions organizations can take to be more inclusive.

**Case Synopsis:**

Heralded as an LGBTQ+ friendly hospital, Mercy San Juan Medical Center lost its luster amongst members of the LGBTQ+ community and its allies in 2016 when, just two days before the scheduled procedure, the medical facility refused to perform a hysterectomy on a transgender patient. California state law prohibits discrimination against people in public places of accommodation, i.e., a hospital, based on sex; however, as a faith-based organization, Mercy also faced internal strife as it struggled to comply with internally and externally created codes of ethics that seemed to be at odds with one another.

This business case exposes students to the intersection of law and ethics as it relates to access and inclusivity for a historically underserved population. Through discussion and analysis, students must determine what actions corporations can or should take, as well as and how the courts should decide on the actual actions of the organization.

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## **THE AMERICAN CONTRACT BRIDGE LEAGUE: HOW TO CATCH AND PUNISH CHEATERS, ONLINE AND OFF?**

Ashok Rao, Rochester Institute of Technology (retired)  
Janis L. Gogan, Bentley University

### **Case Objectives and Use**

This case focuses on a large national organization that is confronted with evidence of an increase in cheating. It thus needs to find better ways to prevent, detect and punish cheating.

This Instructors Manual is designed to support undergraduate or graduate-level courses on Business Ethics or General Management. The case supports student analysis and discussion directed at the following Learning Objectives:

- LO-1 Explain how actual or perceived dishonorable behavior by members of an organization can erode constituents' trust in the organization.
- LO-2 Explain how rapidly-evolving digital technologies --hardware, software, and databases -- can both solve problems and cause problems (i.e., the Double-Edged IT Sword).
- LO-3 Evaluate whether and to what extent a specific organization's policies, procedures, and manual and computerized controls help prevent wrongdoing, detect wrongdoing when it nevertheless occurs, and punish the wrongdoers.
- LO-4 After analyzing a situation using the skills and knowledge identified in LO-1, L0-2 and LO-3, offer specific actionable recommendations to improve an organization's system of manual and computerized controls and restore constituents' trust.

### **Case Synopsis**

In January 2022 the Chair of the Appeals and Charges Committee of the American Contract Bridge League (ACBL), needed to respond to accusations that the ACBL was moving too slowly to curb cheating, both in traditional face-to-face and online games and tournaments. When, due to the COVID-19 pandemic, most bridge play moved online, accusations of player cheating had increased fivefold. Although some cheaters were caught and publicly shamed in 2020 and 2021, others likely escaped the ACBL's detection. The case protagonist was concerned that some current and prospective ACBL members were losing interest in bridge, apparently out of a belief that dishonorable players tainted the game by dishonestly collecting points in local, national and international tournaments. Due to the game's complexity, some forms of cheating were difficult to detect or prove, and new cheating tactics regularly came to light.

An October 2021 article in *The New York Times* shined an unwanted spotlight on this problem. Some colleagues felt that harsh and swift punishment of cheaters was needed; others thought it might do more harm than good -- in part by diverting resources and attention away from necessary attempts to recruit younger players. Could new computer software cost-effectively and quickly detect cheaters and restore players' trust in the ACBL? The protagonist was uncertain as to the best way forward.

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## **CAGED OR CAGE-FREE?**

Karen E. Boroff, Seton Hall University  
Karen Meleta, Wakefern Food Corp.  
Paula Alexander, Seton Hall University

### **Case Objectives and Use**

The learning objectives of this case are threefold:

1. To understand and apply stakeholder analysis, rooted in an issue arising in the food industry
2. To evaluate the relative importance of stakeholders and their stakes
3. To apply stakeholder analysis in fashioning a recommended course of action

This case is appropriate for MBA courses centering on corporate social responsibility and stakeholder analysis. It has been tested in precisely this course. The case is also appropriate for courses centering on food, food production, food marketing and similar courses in the food industry. The case was tested in a blended undergraduate and graduate course on The Business of Food, where interdisciplinary themes of corporate social responsibility and food production intersected.

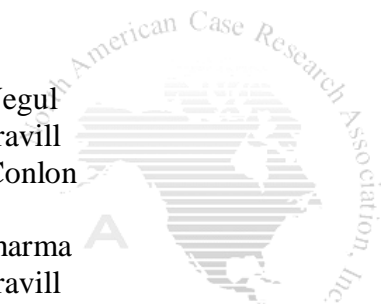
### **Case Synopsis**

As the year 2021 closed, Mel Mathers, the chief sustainability officer of a food cooperative, the Independent Food Retailers Consortium (IFRC), had to make a decision, recommending to IFRC's executive committee on what kinds of eggs should be sold in the grocery stores of the members of the cooperative. At that time, the food cooperative sold eggs sourced from hens who produced eggs under a caged (or battery) system. However, when Mathers was flooded with emails from animal rights activists urging IFRC to sell eggs only from hens that were not caged, Mathers began researching egg production systems. Mathers' research is described in the case and students have to decide what option Mathers should recommend to the executive committee, grounded in IFRC's policies and responsive to the many stakeholders in IFRC's operating environment.

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**Digital Technologies and Operations Cases**  
**Track Chair:** Clinton Daniel, University of South Florida

<b>Cases</b>	<b>Authors</b>
Quality Control Automation Dilemma at Ultimate Manufacturing Software, LTD. Part B	Janis Warner Christopher Cassidy
Developing Vaccines at Pandemic Speed	Hossein Rikhtehgar Berenji
VIBHOR - New Business Options	G. Shankaranarayanan Donna Stoddard Bojan Amovic
A Project Management Crisis: Moving a Multi-Institutional Collaborative In-Person Sprint Online	Kimberlee Center
Majestic Services Inc.: Managing Disruptions in Supply and Demand	Fatih Yegul Jane Gravill Juliet Conlon
Statistical Process Control & Total Quality Management at Hi-Tech Surfactants Ltd.	Ravi Sharma Jane Gravill Fatih Yegul Gaurav Bhardwaj



# QUALITY CONTROL AUTOMATION DILEMMA AT ULTIMATE MANUFACTURING SOFTWARE, LTD.

## PART B

Janis Warner, Sam Houston State University

Christopher M. Cassidy, Sam Houston State University

### Case Objectives and Use

The case describes the company's need to upgrade their quality control process for testing their software product before its release. The case is designed for students to follow Project Management and Systems Analysis and Design (SA&D) processes and tools to identify, define and develop a solution to the problems described in the case. This case is intended for use in the SA&D, module of a MIS, Operations Management, or project management course. The case learning objectives utilize tools and techniques from Phase I – Project Selection and Initiation and Phase II- Project Analysis of the Systems Development Life Cycle (SDLC) (Valacich, 2015). Both project management and technical documentation are used to clarify the project parameters and project goals, as well as technical documentation including requirements determination, generating alternative design strategies and selecting the best alternate design strategy.

### Case Synopsis

UMS was a supplier of ERP software for manufacturers in a number of different industries. The COVID pandemic increased the sense of urgency for automating their software quality control testing so they could improve their time to market and quality without needing to have employees face to face performing an inefficient, cumbersome and error prone manual process.

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**DEVELOPING VACCINES AT PANDEMIC SPEED**  
Hossein Rikhtehgar Berenji, College of Business, Pacific University

**Case Objectives and Use**

In this case, the traditional paradigm and pandemic paradigm of vaccine development for the COVID-19 are discussed. Students learn about the process and how BioNTech went through all these steps to develop the vaccine at a pandemic speed. Further, students need to use their project management knowledge to understand how phases of vaccine development are executed in the paradigms mentioned above. The case exemplifies a project management process that runs multiple stages simultaneously to develop an effective and safe vaccine as fast as possible. This case can be used in upper-level undergraduate courses in operations and supply chain management and general or executive MBA courses in operations management or project management.

**Case Synopsis**

The global influenza pandemic in 1918 killed an estimated seventy million people worldwide. More recently, we have also observed a global pandemic of COVID-19. A challenge in responding to pandemic diseases is that vaccines may not exist for them at the time of occurrence. In almost all cases, several years would be needed to react to the first doses of vaccines. COVID-19 pandemic has mandated a paradigm shift in the attitudes of governments, organizations, and vaccine manufacturers to develop a vaccine at pandemic speed. In this situation, BioNTech utilized a new strategy in developing vaccines for the COVID-19 pandemic. They executed the phases of clinical development and large-scale manufacturing simultaneously to some degree to expedite vaccine development. In this process, they faced no financial constraints as they received enough funding from the government and the NGOs. Thus. The only objective was to have an effective vaccine as fast as possible.



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## **VIBHOR – NEW BUSINESS OPTIONS**

G. Shankaranarayanan, Babson College

Donna Stoddard, Babson College

Bojan Amovic, Babson College

### **Case Objective and Use**

This case is meant to reinforce concepts covered in today's introductory information technology and systems (ITS) courses, as well as introductory operations management (OPS) courses. Although there is a management strategy angle, the primary intent is to address concepts in information technology. The case is targeted for the introductory (core) MBA course in technology to introduce concepts related to digital transformation. It can also be used in advanced MBA courses on digital strategy and digital transformation. The second target is the core information technology course (sophomores and juniors). The key IT concepts examined using this case are: (1) the need for a business to leverage technology to survive in today's digital world. (2) Understanding the IT infrastructure and the role of cloud computing in establishing the infrastructure, and (3) differentiating digitization and digital transformation in organizations. It also offers an opportunity to discuss the roles of blockchain and AI. From an operations course perspective, this case is designed as an in-class activity or homework assignment to reinforce process mapping and analysis. The key skills students will develop after this case are: (a) understand how technology creates business opportunities and learn to apply technology concepts to identify a new business opportunity or solution. (b) Recognize why businesses need or are forced to transform with digital technologies and the role that automation (or digitization) plays in assisting with operations and transformation. (c) Understand why customer-centricity and data are critical in becoming digital, and (d) apply concepts of process analysis and data in maximizing efficiencies in manufacturing operations.

### **Case Synopsis**

This case is about a jewelry business, VIBHOR, which designed and fabricated traditional jewelry. Private label was the largest market for companies like VIBHOR. Jewelry retailers sold the jewelry "pieces" designed and manufactured by VIBHOR as their own "private" brand. This case highlights the declining domestic retail jewelry industry in 2019-20 due to the rise of jewelry giants like De Beers and Chow Tai Fook who made it impossible for smaller retailers to compete on cost. Second consumers were shopping more online. Third, consumer preferences for jewelry were changing with trendy pieces more in demand than traditional. The smaller retailers, the customers of VIBHOR, were failing. Vibhor Dhadda, the newly minted COO of VIBHOR, was concerned. VIBHOR supported a relatively small number of customers. VIBHOR did not have the need to use social and mobile technologies given its small target market. Its information systems and infrastructure were minimal. If VIBHOR needed to survive in today's market, VIBHOR needed to gain direct interaction with its end-consumers, the people that wear the jewelry. This would give VIBHOR faster access to changing fashion trends and with an inhouse manufacturing unit, VIBHOR can respond to such trends with agility. But, doing so meant selling directly to end-consumers – a risky proposition that would jeopardize their existing relationships with small jewelry stores and their "private label" image. Scaling their systems to support a larger customer base was one challenge. Leveraging new technologies such as social, mobile, cloud, and analytics to become customer centric offered a different set of challenges. VIBHOR needed a new business model and begin their journey into digital transformation.

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## **A PROJECT MANAGEMENT CRISIS: MOVING A MULTI-INSTITUTIONAL COLLABORATIVE IN-PERSON SPRINT ONLINE**

Kimberlee Carter, Conestoga College ITAL

Jane Gravill, Conestoga College ITAL

Fatih Yegul, Conestoga College ITAL

### **Cases Objectives and Use**

This case is positioned for use in Introductory Project Management Courses that cover the Project Management framework from the Project Management Institute. Key topics covered in the case are project management principles and identification and analysis of potential risk events to develop a revised project and contingency plans that incorporate an agile approach.

### **Learning Objectives (LO)**

**LO #1:** Conduct a risk analysis by applying a common Project Management Institute Risk Analysis Framework to determine potential risk events, impact, appropriate risk response strategies, and minimum viable product deliverable(s) in an OER Collaborative Project.

**LO #2:** Contrast the predictive approach to an adaptive or iterative approach as defined by the PMBOK principles to meet the minimum viable product deliverable(s) in an OER Collaborative Project.

**LO #3:** Create a project schedule for an OER Collaborative Project that determines the minimum viable product deliverable(s) required to meet the needs of the project deadline.

### **Case Synopsis**

It was 3 p.m. on Tuesday, March 17th, 2020, and Kim Carter, Professor in the Business School at Conestoga College and Project Lead for a multi-institutional collaboration project, *Medical Terminology Open Educational Resources (MT OER)*, panicked. She had just received communication that the College was closed until further notice. All in-person events at the College were cancelled due to concerns and unknowns over the contagious COVID 19 virus that had resulted in a global pandemic. The MT OER collaboration project was two weeks into Phase 3, which involved multiple faculty subject matter experts (SMEs) adapting chapter content to prepare for the launch of the Phase 4 two-day sprint (Exhibit 1). The Phase 4 sprint, an iterative agile approach to completing tasks, was critical in completing the project in time to meet the August publishing deadline. Phase 3 was now in jeopardy since all faculty Subject Matter Experts (SMEs) were pivoting their work to accommodate remote learning requirements until the College re-opened. All phases of the project had to be completed on time to meet project timelines to allow launch of the MT OER in Fall 2020 delivery. In-person, collaborative efforts where faculty could assist each other with their deliverables had been key to achieving project results. Since in-person events were no longer allowed, Carter had to re-evaluate the current situation and entire project plan to determine if, and how, this project could be completed in time for faculty and learners in the Fall, 2020.

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## **MAJESTIC SERVICES INC.: MANAGING DISRUPTIONS IN SUPPLY AND DEMAND**

Fatih Yegul, Conestoga College Business School  
Jane Gravill, Conestoga College Business School  
Juliet Conlon, Conestoga College Library

### **Case Objectives and Use**

This case study is ideal for introductory-level undergraduate supply chain management courses but can also be used in MBA programs. It can stimulate more advanced discussions in MBA-level programs regarding the causes of the global bullwhip effect at times of crisis and inventory/sales policies under inflationary pressure. Additional discussion questions tailored for MBA students are provided. By studying the challenges MSI had to face, and how they responded or should have responded, students will be able to:

LO#1: Differentiate between alternative capacity management strategies during significant demand fluctuations.

LO#2: Discuss ways to overcome capacity problems when faced with shortages in labour market.

LO#3: Evaluate effective inventory/sales policies under inflationary pressure.

LO#4: Explain the strategies used to handle supply shortages and rationing policies.

LO#5: Understand the importance of customer rationalization when supply falls short.

LO#6: Discuss the causes and implications of the bullwhip effect in supply chains.

### **Synopsis**

This case explains the challenges faced by Majestic Supply Inc. (MSI) during the Covid-19 Pandemic (Pandemic) when the global supply chains had to endure several major disruptions. Founded in 1962, Located in Ontario, Canada, MSI was a steadily growing company in the growing market of HVAC (heating, ventilation & air conditioning) and plumbing parts before the Pandemic.

Disruptions and uncertainties caused by the Pandemic created various kinds of difficulties for MSI during 2020 and 2021. The sudden shifts in the supply and demand patterns forced MSI to make drastic changes to its business operations. Early in the Pandemic, with unprecedented quick drops in the demand, MSI had to shrink in size to remain financially stable. However, as the demand volume unexpectedly jumped back to its pre-Pandemic levels within months, MSI, this time, found it hard to grow at the same pace due to shortages in the labour market.

During the summer of 2021, MSI was dealing with new challenges. The bullwhip effect triggered by the sudden shifts in consumer preferences at the onset of the Pandemic started to impact the supply and demand balance causing price inflation and material shortages. MSI, in regular times, received once-a-year price updates from suppliers; but now the updates were coming quarterly, amounting up to 50% annual hikes for some items. Material shortages meant much longer lead times from vendors. Troy Gilberts, a category manager at MSI, was asked to meet with the management team to help them make some critical discussions. Gilberts needed to recommend a strategy to management regarding how the company would deal with the frequent price hikes and manage their sales channels and inventory at a time of limited supplies while trying to avoid considerable damage to the customer service levels. Where should he start?

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching notes were anonymously peer reviewed for presentation at the NACRA 2022 Conference, October 6-8, 2022, by Fatih Yegul, Jane Gravill, and Juliet Conlon. Contact Person: Fatih Yegul, Conestoga College, 299 Doon Valley Drive, Kitchener, ON N2G 4M4 Canada. Phone: 5197485220 ext:2148 Email: [fyegul@conestogac.on.ca](mailto:fyegul@conestogac.on.ca)

## **STATISTICAL PROCESS CONTROL & TOTAL QUALITY MANAGEMENT AT HI-TECH SURFACTANTS LTD.**

Ravi Sharma, Conestoga College  
Jane Gravill, Conestoga College  
Fatih Yegul, Conestoga College  
Gaurav Bhardwaj, Hi-Tech Surfactants

### **Case Objectives and Use**

This case was developed and written for use in higher-level (third year or higher) courses in Operations and Supply chain Management or in Quality Control, for Bachelor's Degree or Advanced Diploma programs in Business Schools or Schools of Engineering.

By studying the case and working on the case questions, students will be able to:

1. Discuss the advantages and disadvantages of outsourcing.
2. Analyze different types of processes and develop process maps.
3. Calculate utilization and efficiency based on design capacity, effective capacity and actual output.
4. Examine and apply the Total Quality Management concepts and tools - statistical process control, process capability, six sigma, and Taguchi concepts.
5. Discuss mid-term quality management strategies for manufacturing systems.

### **Case Synopsis**

Hi-Tech Surfactants (HTS) was a supply chain partner (a contract manufacturer) of Hindustan Lever Limited (HUL), the Indian subsidiary of Unilever, the global giant in the consumer products market. HTS manufactured and shipped different sizes of Wheel brand detergent for fabric wash. HUL provided the raw materials and production plans (through the ERP system – SAP). HUL also transferred the systems know-how for the processes and the procedures for quality control.

Harsh Bhardwaj had led HTS, a Private Limited Company, to maintain a successful, profitable and growing relationship with HUL. His way of working was 'being the best.' In January 2022, he invited his long-time friend and management consultant, Ram Prasad, to look at the operations with a fresh perspective.

HTS had a continuous process. Raw materials were mixed according to the recipe (blending formula) provided by HUL. Automatic packaging machines measured and sealed the detergent in pre-printed PVC film sachets. These were then packed in larger gunny bags and shipped to HUL depots.

If HTS used more materials than the allowance limits set by HUL, they had to pay. Ram suggested that the process of measuring, filling and sealing the sachets could offer a scope to improve quality and productivity and reduce material usage. He proposed using statistical process control (SPC) and related concepts of process capability, six sigma and target-oriented quality. He asked HTS to record the data on samples inspected during packaging.

Team members at HTS were satisfied with their quality and productivity. They operated within norms set by HUL and received no complaints. A recent audit by SGS on behalf of HUL and the British Retail Consortium gave HTS an AA rating. Harsh was in a dilemma. He needed to decide whether to maintain the status-quo or consider implementing SPC and related concepts for the packaging process, as Ram proposed.

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**Entrepreneurship, Family, and Small Business Cases**  
**Track Chair:** Erin Pleggenkuhle-Miles, University of Nebraska Omaha

<b>Cases</b>	<b>Authors</b>
Familia Torres. From Sustainability to Regenerative Agriculture	Alfred Vernis Veronica Devenin Marcel Planellas
The Strategy Academy: The Final Hurrah of an Academic Entrepreneur	Aditee Prabhakar
Orange Glo International: Do you Believe in Magic?	James Fisher Robert A. Boyle
Tiiga: Nature's Hydration	Sam McDermott Erin Pleggenkuhle-Miles Erin Bass
Spur Tree: From Spices to Food	Prince D Graham-Haynes Andrea Sutherland Paul Golding
The Furlough Cheesecake: The Power of Social Networks	Minnette Bumpus
Pepper Place Market: General Store	Jeffrey Sanders Jonathan Lowery Jamee York Charles M. Carson



## **FAMILIA TORRES. FROM SUSTAINABILITY TO REGENERATIVE AGRICULTURE**

Alfred Vernis, ESADE Business School  
Verónica Devenin, ESADE Business School  
Marcel Planellas, ESADE Business School

### **Case Objectives and Use**

This case is intended for use with introductory Strategy courses in BBA or MSc programs, to elicit discussion on the different stages' sustainability goes through in multinationals, and what sustainability strategies are being used by large companies. It also serves to introduce the concept of regenerative agriculture. The case works very well once the students have understood the basic concepts of strategy and sustainability.

The case can also be used with other audiences such as MBAs or Executive Masters courses. It can help to show that some multinational enterprises have been making headway in sustainability for many years. And also, to dig deeper into the dilemmas encountered in building a competitive strategy based on long-term sustainability.

### **Case Synopsis**

At the beginning of 2022, when the pandemic was finally nearing its end, the challenge for Familia Torres was how to define a sustainability strategy for the future. Although Familia Torres had been working actively since 2008 to mitigate and adapt to climate change, through its Torres & Earth program, by 2021 the current and future scenario presented serious challenges for the company. This had led Familia Torres to search for new terroirs at higher altitudes to find the right balance of heat during the day and cold at night, in order to achieve a quality wine. Another strategy had been to recover local ancestral varieties, resilient to these new climate scenarios. The threat of water scarcity also loomed over the vineyards, as well as other ecological risks, such as the systematic loss of soil quantity and quality due to erosion, which reduced its productivity.

In this scenario, Miguel Torres M. brought into discussion an emerging trend that went further than the concept of sustainability as “reducing harm”. This “beyond sustainability” strategy was presented as a hopeful one, which focused on reversing climate change from the local sphere of action, and was consistent with the family motto “the more we take care of the land, the better wine we produce”. However, this promising strategy involved many uncertainties.

In the light of this situation, the Familia Torres management team sometimes ask themselves whether they should maintain the strategy of going “beyond sustainability” or they should consider strategies more consistent with the mainstream approach to climate resistance viticulture, such as, for example, the genetic improvement of the grapes, or intensify the strategy of transfer to colder areas.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note were anonymously peer reviewed for presentation at the NACRA 2022 Conference, Niagara Falls, Ontario, Canada, October 6-8, 2022. © 2022 by Alfred Vernis, Verónica Devenin and Marcel Planellas. Contact person: A.Vernis, ESADE, Avenue Pedralbes 60-62, 08034, Barcelona (Spain); [alfred.vernis@esade.edu](mailto:alfred.vernis@esade.edu)

## **THE STRATEGY ACADEMY: THE FINAL HURRAH OF AN ACADEMIC ENTREPRENEUR**

Aditee Prabhakar, Indian Institute of Engineering Science and Technology, Shibpur

### **Case Objective and Use**

The case focuses on six major components of the conceptual framework of entrepreneurship namely entrepreneur, entrepreneurial choices and innovation, the environment, the organizational form (the enterprise), the organizational outcome, and the entrepreneurship process in venture creation (Ray & Ramachandran 1996). In addition, the case covers the four phases of venture creation: opportunity recognition phase, venture start-up phase, sustainability and growth phase, and concluding phase (Ray & Ramachandran 1996). We also recognize and highlight the embeddedness of the entrepreneur, enterprise, and the environment.

### **Case Synopsis**

The case documents the evolution of an individual (Ranjan Das) as an entrepreneur and the formation and early days of his SME start-up The Strategy Academy (TSA) – a Strategy Institute on the Live Digital platform. The case is unique in the sense that the protagonist – an IIMC Professor of Strategic Management, an industry veteran, and a successful consultant, starts his first entrepreneurial venture at the age of 58 with the mission of taking strategy education to the masses. The case narrates how Ranjan identified an opportunity, convinced himself to start an entrepreneurial venture and in the process, innovated a service delivery model - ‘INDIAN’, an abbreviated form of “Intelligent(I) Network(N) of Distributed(D) and Independent(I) Atomized(A) Nodes(N)” and struggled to make the venture successful in the face of several adversities. It also alludes to some very interesting dialectics emanating from a continuous internal conflict between a seasoned strategic mind and reflexive entrepreneurial characteristics co-existing within the entrepreneur. The case surfaces the internal dilemmas of Ranjan the individual and Ranjan the founder and head of TSA and shows how he overcame those dilemmas through personal or business decisions. Moreover, The case presents whether and how a first-generation entrepreneur can build and sustain an innovative venture in the knowledge-intensive e-learning and training industry comprised of entrenched firms having enormous brand equities, and financial and other resources in the Indian economy.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching notes were anonymously peer reviewed for presentation at the NACRA 2022 Conference, October 6-8, 2022, by Aditee Prabhakar, Indian Institute of Engineering Science and Technology, Shibpur. Contact Person: Aditee Prabhakar, Indian Institute of Engineering Science and Technology, Shibpur Email: aditeepabhakar22@gmail.com

## **ORANGE GLO INTERNATIONAL: DO YOU BELIEVE IN MAGIC?**

James Fisher, Saint Louis University, Richard A. Chaifetz School of Business

Robert Boyle, Saint Louis University, Richard A. Chaifetz School of Business

### **Case Objectives and Use**

This case explores the intersection of entrepreneurship and marketing. This multi-disciplinary focus makes the case a better fit for advanced undergraduates or graduate students enrolled in Entrepreneurship, Marketing Management or Business Strategy courses but less well suited for students in introductory-level courses. The trajectory of the case moves from strategic issues like product development and value creation to tactical concerns like advertising and other promotional efforts. Building this bridge from entrepreneurial business to sales performance requires students to make connections and understand the purpose of a variety of marketing competencies, including those related to branding, positioning, and advertising. In addition, the entrepreneurial call to “listen for what resonates with potential customers” is offered as a consideration when developing messaging, determining appropriate channels, and strategizing for growth.

### **Case Synopsis**

This case describes the evolution of Orange Glo International from a small family-owned and operated business selling consumer cleaning products – out of the family’s garage – to a firm with national sales of \$6 million. This remarkable story of entrepreneurial success and strong sales growth has several dramatic pivots: an initial period of trial-and-error efforts of husband-and-wife team, Max and Elaine Appel, in the mid 1980s; the entrance of another family member, son Joel Appel, into the family business in the early 1990s; and the sales take-off during the period of 1995-97. This dramatic growth was linked with the selling of Orange Glo products on a novel sales platform, the Home Shopping Network, by a uniquely talented pitchman, Billy Mays. Success with this television-based marketing channel has the Appels then considering another mass marketing technique, namely, infomercials (again using their pitchman, Billy Mays). The case concludes as an infomercial for Orange Glo’s new product, OxiClean, is developed and then tested, with encouraging results. A range of potential next steps are detailed at the conclusion of the case.

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## **SPUR TREE: FROM SPICES TO FOOD**

Prince D Graham-Haynes, School of Entrepreneurship, University of Technology Jamaica,  
Andrea Sutherland, College of Business and Management, University of Technology Jamaica  
Paul Golding, College of Business and Management, University of Technology Jamaica

### **Case Objective and Use**

The Spur Tree IPO case can be used in a small business strategic management courses at both the senior undergraduate and graduate levels. In a strategic management course, the case can be used to demonstrate the lean start up model, to highlight different types of diversification and to evaluate a firm's diversification moves using Porter's three tests. The case can be used to illustrate the well-known Ansoff matrix and SWOT analysis. Students could also discuss at the macro level how the Junior Stock Market and the Free Zone supports and facilitates the growth of small and medium enterprises (SMEs) such as Spur Tree.

### **Case Synopsis**

Albert Bailey is the Executive Director and Chief Executive Officer of Spur Tree Spices, a Jamaican company specializing in authentic Jamaican spices. The company which started in 2006 targets the Jamaican diaspora in the United States, United Kingdom, and Canada had grown steadily, growing revenues from J\$290M in 2016 to J\$701M in 2020, primarily from internal financing. In 2021 the company decided to go to the capital market for funding for strategic expansion. The initial public offering (IPO) was oversubscribed by 31/2 and netted after expenses and eliminating debt J\$141M. Now in February 2022 Bailey needed to execute the expansion strategy. The case invites students to use the lean start-up model to evaluate Spur Tree's growth, Porter's three tests to evaluate a firm's diversification strategy and to use SWOT analysis with Ansoff's growth matrix to evaluate growth strategies.



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## **THE FURLOUGH CHEESECAKE: THE POWER OF SOCIAL NETWORKS**

Minnette Bumpus, Bowie State University

### **Case Objective and Use**

By analyzing and discussing the case, students should be able to: Assess the role of communication technology; illustrate the various steps in the decision-making process; evaluate the role of risk-taking propensity in the decision-making process; and explain the role of internal pressures for change in the growth of a venture. This descriptive case, which has been classroom tested, is most appropriate for undergraduate level courses in organizational behavior. The primary topics of discussion in this case are decision making and communication. Secondary topics, which are subsets of the primary topics, are risk propensity, organizational change, and social media. Suggested prerequisite textbook chapters and supplemental readings for analyzing this case are provided in the Theoretical Linkages and Associated Reading section.

### **Case Synopsis**

Sisters Jaqi Wright and Nikki Howard were furloughed during the longest federal government shutdown in U.S. history (Frazee & Desjardins, 2018). The furlough, however, did not prevent Howard, an avid baker, from preparing one of her delectable cheesecakes to ring in the New Year. The idea to sell cheesecakes was born on New Year's day of 2019, after their mother, who had just finished a piece of cheesecake "said that the cheesecake was so good it could be sold" (Radcliffe, 2019, para. 4). Within days, "the sisters joined Howard's perfected recipe with Wright's business acumen and 'The Furlough Cheesecake' (Christian, 2019, para. 1), a name coined by Wright (Radcliffe, 2019), was born.

Widespread media coverage and influential exposure spurred the rapid growth of the business during its first year of existence. The momentum continued during the second year, despite a global pandemic that affected social interactions.



The author developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note were anonymously peer reviewed for presentation at the NACRA 2022 Conference, Niagara Falls, Ontario, Canada, October 6-8. © by Minnette Bumpus. Contact person: Minnette Bumpus, Bowie State University, College of Business, Center for Business & Graduate Studies, Suite 2328, 1400 Jericho Park Road, Bowie, MD 20715, 301-860-3640, [mbumpus@bowiestate.edu](mailto:mbumpus@bowiestate.edu)

## **PEPPER PLACE MARKET: GENERAL STORE**

Jeffrey Sanders, YMCA-Huntsville  
Jonathan Lowery, Ronald Blue Trust  
Jamee York, Gibbs & Sellers  
Charles M. Carson, Samford University

### **Case Objectives and Use**

This case is intended to be used by entrepreneurship or business strategy courses at the undergraduate level. After a discussion of the case, the students should be able to determine the main attributes that effect the entity. The key issue that should be identified is the importance of strategic planning and it impacts the future of a business as it considers a new venture. The objectives are:

- 1) To identify whether a business with a core and loyal customer base, can take the next step and grow the business with a new concept.
- 2) To identify what options, if any, will provide the business with the best possibility of success.
- 3) To illustrate the importance of a Strategic Plan for a business.

### **Case Synopsis**

Pepper Place Market must decide whether they should develop a new stand-alone store. This store would operate as an extension of the traditional Saturday market. If a new store is opened, then the following must be determined: Where will the store operate? Should the store relocate to a new location or remain close to the existing location? What goods and products will the store offer? Should those goods and products come exclusively from local Alabama farmers or will the market need to develop new sources of goods and products that can be sold at the store?

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## Marketing and International Business Cases

**Track Chair:** Silvia Cacho-Elizondo, IPADE Business School

**Co-Chair:** Grishma Shah, Manhattan College

Cases	Authors
Mercado Libre and Tucarro.com	Ignacio Osuna Javier J. O. Silva
Compagnie Financière Richemont SA: From Hard-Luxury to E-Commerce	Ashok Som
Dulce's Sales Time and Territory Management Decisions	Julie Nelsen
JAC: The Challenge of Democratizing the Electric Car in Mexico	Silvia Cacho-Elizondo
B2B Branding: Strengthening the Legrand Advantage	Ruppal Walia Sharma Sameer Saxena
Running It's Way to the Top: Brooks Running	Mignon Reyneke Henko Mouton
Globant: Hacking our Business Model	Javier J. O. Silva Enrique Chamas Eduardo Catalán Villegas
Warner Bros.: Wonder Women 1984 Remaking the Future	Malay Krishna Sunny V. Arora Garvita Dutta
Caverton: International strategy of soaring into African markets in Turbulent Weather	Adeniyi Damilola Olarewaju Sunday Abayomi Adebisi
PayMob: Transforming Digital Payments in Egypt and the Region for a Cashless Society	Seham Ghalwash Ayman Ismail Maria Ballesteros-Sola Ahmed Dahawy

Bricks or Clicks: Dawlance (private) Limited Channel Dilemma

Farah Baig  
Rija Alam  
Aafia Khan  
Zarmeen Lakhani  
Sarah Naqvi  
Areeba Khan

Croissants for Breakfast at Tiffany's? Challenges After the LVMH Takeover

Ram Subramanian  
Grishma Shah

NB Distillers: How to Promote the Brand?

Ebrahim Mazaheri

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### Case Objectives and Use

This case was designed to be used in MBA, Executive MBA or Executive Education programs, as part of strategic marketing or marketing management modules, to discuss issues related to business model innovation with an emphasis on the design of value propositions, monetization and pricing. It can also be used in targeted business model innovation programs and for undergraduate students, at the end of preparatory courses in strategic marketing.

The case is particularly useful for understanding freemium models as mechanisms for growth and monetization in platform models. The context in which the case's events take place make it particularly attractive, as it is set in an emerging economy (Latin America) where the protagonist is responding to a significant challenge whilst studying for his Executive MBA, working in a category most people are familiar with (vehicles) in a leading e-commerce platform.

During the analysis of the situation and resulting decision, the student will:

1. Reflect on a platform business model and judge the value proposition's relevance for the customer.
2. Design changes or adjustments to the value proposition in order to ensure continued growth.
3. Judge how relevant the freemium model is to a value proposition that includes these suggested changes.
4. Adjust the freemium model and prices to achieve a better fit with the value proposition.

### Case Synopsis

In late January 2022, Juan Uribe, the recently promoted Head of Marketplace VRS (Vehicles, Real Estate and Services) at Mercado Libre Colombia (hereafter, MELI), had been asked to present a diagnosis and proposal, with the aim of obtaining more value for MELI, the leading e-commerce technology company in Latin America and seventh in the world, without risking the volume of vehicles offered on the platform or damaging the user experience (seller or buyer). He and his team questioned the vehicle marketplace's 'freemium' model, which, apart from allowing sellers to publish vehicles for free, monetized with three paid options. They also wondered whether the prices were adequate and fit the value proposition, and even whether the latter was the most appropriate. MELI's value proposition was 'sell it yourself'. Juan and his team were considering changing that or adding another format, such as 'concierge' or 'instant offer', where competitors such as Kavak and OLX had experienced some growth.

The alternatives Juan's team considered, besides different formats for the value proposal, included establishing different prices according to city, defining a dynamic rate based on the value of the car being sold, limiting the number of free publications per year or the display options available for free (number of photos or videos, or fewer days visible on the platform), and eliminating one of the paid options or reducing their price. Juan had to prepare and present an innovative proposal for the business model in one week's time to his new regional boss, the Senior Director of MELI Motors.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note were anonymously peer reviewed for presentation at the NACRA 2022 Conference, Niagara Falls, Ontario, Canada, October 6-8. © by Javier J. O. Silva, and Ignacio Osuna Contact person: Ignacio Osuna, INALDE Business School, [ignacio.osuna@inalde.edu.co](mailto:ignacio.osuna@inalde.edu.co)

# JAC: THE CHALLENGE OF DEMOCRATIZING THE ELECTRIC CAR IN MEXICO

Silvia Cacho-Elizondo, IPADE Business School

## Case Summary

The case was based on a real Mexican company, *Giants Motors Latinoamérica* (GML), which produces, assembles, distributes, and sells commercial vehicles. On the morning of June 9<sup>th</sup>, 2022, Isidoro Massri, General Director of JAC Mexico and Corporate Director of GML, reflected on the trajectory of the JAC brand and how it should become a benchmark in the electric car industry in the country. The Board of Directors had asked him to present the *2023-25 Marketing Plan* and *Communication Strategy* at the next meeting to be held on July 28<sup>th</sup>. It would be a complicated meeting since the majority shareholder would be present, the engineer Carlos Slim Helú, Mexican tycoon and businessman, whose reputation was characterized by high standards. In collaboration with his father, Elias Massri, founder of GML Company and also Chairman of the Board and CEO of GML, and Eduardo Noriega, Marketing Director, Isidoro needed to design an aggressive marketing proposal to position JAC as the leading brand within the electric car market in Mexico.

Even if JAC was already considered as the leading brand within the electric car segment, Isidoro faced some critical challenges and decisions. Among these were making JAC a profitable brand within the electric car segment for end-users, evaluating the role and transformation of the current dealer network to decide whether it should remain under the same dynamics or migrate to digital channels. The action plan to be designed should focus not only on strengthening the JAC brand but also promoting accelerated penetration and growth of the electric car market in the Mexican territory.

## Case Synopsis

Isidoro needed to evaluate growth options and assess the different elements of the marketing mix (Product Portfolio, Pricing, Distribution and Communication strategies). Also, the Board requested an answer regarding how to prioritize three action courses in order to define which one suited the best to the strategic goals already stated: a) Consolidate JAC as a diversified brand, b) Invest in the company's internal infrastructure and c) Develop the incipient market for electric cars in the country. It was necessary to explore how to guide the ongoing transition to electric vehicles (EVs), as well as amplify and accelerate its pace. Around the world, governments were driving the shift from fuel-powered cars to electric vehicles. This change was essential and was being precipitated by growing global environmental concerns. However, there were several obstacles to the widespread adoption of electric vehicles in the Mexican territory, where the market was still in its infancy and there were not enough government and industry incentives.

Fleets had invested in electric vehicles, but to drive demand from end customers, Isidoro and his marketing team had to invest more in educating the market by improving brand awareness and positioning. Being a Chinese brand had been associated in Mexico with outdated misunderstandings and they needed to keep working to change those negative perceptions. In addition, dealers were facing difficult times that forced them to reform their strategies and reconfigure their business model and, they felt threatened by online sales platforms. To achieve large-scale adoption of electric vehicles, Isidoro must decide how to ensure that consumers switch to electric vehicles and how far he should lead the company's brand diversification strategy.

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## **B2B BRANDING: STRENGTHENING THE LEGRAND ADVANTAGE**

Ruppal Walia Sharma, S. P. Jain Institute of Management and Research  
Sameer Saxena, Legrand India Pvt. Ltd.

### **Case Objectives and Use**

This case is designed for use at the postgraduate level in brand management or b2b strategy courses, as well as in executive management programs. Within the course this case is best situated half way post coverage of introductory modules (what constitutes brand equity/ basics of b2b strategy).

#### **This case aims to enable students to**

- Identify factors which play a key role in developing the branding strategy for b2b brands
- Understand the criteria which can be used to analyse the effectiveness and relevance of strategic options for brand building
- Be able to use a multi stakeholder lens to recommend how brands can add value and strengthen their equity over time
- Understand how emotions and relationships can be leveraged in b2b branding

### **Case Synopsis**

Mohit Sehgal, was excited about his first big assignment since joining the marketing team of Legrand India as Assistant Manager. Legrand, a global conglomerate in the electrical and digital infrastructure business, with a presence across 90 countries, had set up base in India in 1996. Legrand leveraged global knowledge to customize offerings locally and deliver end-to-end solutions across categories and established a strong position in the residential and commercial segments. Over the years, it progressively developed product ranges for wiring devices (switches), home automation, door entry, lighting management systems, cable management and structured cabling to add to its core offerings of circuit breakers and distribution boards. Customer centricity was the prime driver for Legrand. Heavy investment in R&D and focus on innovation and design helped it develop an edge in the Indian market. A brand audit conducted by the marketing team in India, indicated that Legrand was a well-respected brand, strong on associations of being ethical, premium and offering the best products. However, brand awareness was limited and its perception as a premium brand, contributed to Legrand being perceived as aloof and distant. As the category evolved, Legrand needed to place its brand in a vantage position. At the same time the brand promise needed to address the significant diversity of Legrand's offerings and appeal to multiple stakeholders. In order to take the brand from 'utilitarian' to 'joie de vivre', the emotional benefit needed to be deepened. By 2017 end, the brand promise had been operationalized as 'Advantage Legrand', which was built on the theme of 'thoughtfulness that provided delightful advantages to all stakeholders, and led the category.' Several initiatives were taken to enhance customer and stakeholder experiences, expand brand touch points and build emotional connect.

It was November 2018, about an year since the launch of 'Advantage Legrand'. As the planning cycle for 2019 approached, the marketing team needed to fine tune the strategy and work out the implementation details to build on this promise. Sehgal had been asked to put together a plan, detailing proposed initiatives for enhanced visibility and deeper stakeholder engagement. Legrand's brand strategy was a key focus area for top management and all eyes were on Advantage Legrand.

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## COMPAGNIE FINANCIERE RICHEMONT SA: FROM HARD-LUXURY TO DIGITAL

Ashok Som, Management Department ESSEC Business School

### Case Objective

The case aims to discuss (a) the unique properties of the hard luxury sector (b) the logic of unrelated diversification of Richemont (c) the leverage of their core competency to foray into the e-commerce market (d) the paradox and the challenges of investing in e-commerce business.

### Case Synopsis

The Swiss Compagnie Financière Richemont SA - founded in 1988 by South African businessman Johann Rupert - is the third largest luxury conglomerate in the world. Unlike its biggest competitors, Richemont has a particularly strong focus on watches, jewelry and writing instruments. Due to its strong dependency on the hard luxury sector, the company has experienced turmoil during the economic crisis of 2008 and in 2020 with the continuing pandemic. Their core business was continuously exposed to numerous disruptive developments. Technical advancement such as man-made diamonds as well as the rise of smart watches were significantly changing the paradigm of the hard luxury sector. With the ever-changing environment of their core business, Richemont decided to foray into online luxury retail by acquiring a majority stake at YOOX NET-A-PORTER Group, one of the leading e-commerce companies for luxury goods. With its ambitious vision for the YNAP Group, the further acquisition of a leading pre-owned watch selling platform as well as the partnership with the Chinese e-retail giant Alibaba, Richemont found a new focus. It seemed that the former specialist in precious stones, diamond jewelry and timekeeping were reinventing themselves.

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## **DULCE’S SALES TIME AND TERRITORY MANAGEMENT DECISIONS**

Julie Beckel Nelsen, Washington State University – Vancouver

### **Case Objectives and Use**

This case study is appropriate for an undergraduate professional selling or sales management course. The case supports student learning of the complexity of a sales role, including decision making, assessing competing priorities, and prioritizing. It offers students an opportunity to numerically evaluate a sales quota versus historical sales quota results and assess the activities required to achieve the goal. It also supports the development of formulating good questions and whom to ask them when answers are not evident. Finally, it aids students in considering and practicing their decision-making processes to make justifiable, effective decisions regarding the management of self and delegation of others.

### **Case Synopsis**

This case follows a sales representative, Dulce Ocampo, who started her new job in May 2022 as a 3M Medical Sales Representative in Maplewood, Minnesota. Dulce must understand and assess her sales territory’s performance against sales targets and determine how the region performed in the past. She also needed to know where she stood toward quota achievement for the remainder of 2022 and determine whether that goal was achievable based on historical data. She then needed to establish her primary sales objectives to achieve her quota for the rest of the year. In addition, Dulce must prioritize a series of messages and actions requested from internal and external individuals and active and potential clients. Finally, she needed to successfully establish a plan for the rest of her week to manage her time and route herself through the territory to maximize her selling time.

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## **RUNNING ITS WAY TO THE TOP: BROOKS RUNNING**

Henko Mouton, University of Cape Town, Graduate School of Business  
Mignon Reyneke, University of Cape Town, Graduate School of Business

### **Case Objective and Use**

The purpose of this teaching case is to understand the challenges and opportunities for an international niche sports brand in a developing market, and to evaluate suitable growth strategies in the developing market in contrast to the developed market. The case is based on Brooks Sports and how its regional strategy for the EMEA region can or cannot be executed in South Africa. The case sketches a clear picture for Brooks' current environment in its developed markets in Europe, as well as the current environment for Brooks in the South African market.

The case has two purposes: first, to investigate the growth challenges faced by a foreign niche brand in the sporting goods sector, competing against a range of competitive brands in a developing market. The reader should evaluate the growth strategies that can be implemented to thrive in this competitive market. And second, to investigate the need for a niche brand to build brand equity. The reader should discuss how the company (Brooks) can develop strong brand equity in the developing market context.

### **Case Synopsis**

The case presents the EMEA managing director as the protagonist and creates a setting at the start of 2021 where he and his team have just signed off on the Brooks EMEA region's strategy for the coming two years. He is faced with the dilemma as to whether the strategy is equally fitting for all their markets, especially for South Africa. The case also incorporates the EMEA region's marketing director's view of the recent successful growth that the brand experienced. Furthermore, the case incorporates the South African distributor and how he sees the current South African market. A leading South African sports retailer also weighs in on the current state of the South African market. All these views allow the reader to develop a holistic understanding of the brand's position in the respective markets and provides some context on how best the brand could grow in the South African market.

The case hints at various key elements that the reader should utilise in the analysis of the case. There is a clear discussion on the company's global operations and performance. An in-depth discussion is made on the product range to allow the readers to familiarise themselves with the brand's offering. The brand has done exceptionally well in the Western European markets, and to explain this growth, the successful marketing strategies that contributed to the growth are explained in detail. The current performance running industry in South Africa is clearly explained from multiple perspectives. The impact of the COVID-19 pandemic is also incorporated in the case. And lastly, the global performance running industry trends are explained.

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## **GLOBANT: HACKING OUR BUSINESS MODEL**

Javier J. O. Silva - San Andres University - Business School

Enrique Chamas - Austral University

Eduardo Catalán Villegas - IAE Business School – Austral University

### **Case Objectives and Use**

The primary learning objective of this case is understanding strategic thinking to maintain competitive advantages in highly dynamic environments. It addresses the need for companies to develop strong dynamic capabilities to rapidly create, implement and transform their business model and stay relevant in turbulent environments driven by digitalization or pandemics, among other events. Since the dilemma of the case focuses on potential innovation towards a successful business model and its impact on resources, capabilities, and customers, it allows for the application of strategic theories and analytical tools to solve it. In short, the learning objectives are the following:

- To learn the role of dynamic and ambidextrous capabilities to adapt to turbulent environments and their impact on business model innovation.
- To understand the relationship between business model innovation, strategy, and dynamic capabilities.
- To analyze the risks of being disrupted and the initiative of disrupting one's own model while still growing.
- To assess the challenges that may arise when managing two business models simultaneously to make a decision.

The case has been designed to be used in MBA and executive programs, specifically for the Business Model Innovation module, which deals with the strategic and commercial analysis of a business model proposal and the challenges involved in its implementation.

### **Case Synopsis**

In January 2020, Alejandro Rossi, Managing Partner of the Business Hacking Studio, and his team had to decide how to deepen the Studio's management, as it was alienated from the company's DNA. Business Hacking was born to rethink clients' business models from a technological perspective. But given the gradual commoditization of technology services for companies and the alignment of consulting firms with the digital transformation process, the Studio's new challenge was to hack Globant's business model, redefine it, and develop new capabilities.

Transforming the company's business model could impact its positioning and customer relationships. This required new resources and capabilities from consultants and the sales force. On top of that, the entire organization had to be aligned with the new Globant. It was necessary to decide whether to move forward with the initiative and determine how to monetize and sustain the new business model.

The richness of discussing this case lies in analyzing the role of strategic management in leveraging the opportunities or threats of the context, strengthening the relationship with key accounts, transforming the business model, balancing the exploitation of resources and exploration of opportunities, aligning resources and capabilities, and handling the necessary transformation process in an environment as dynamic as is the provision of technology consulting services. The case also shows the importance of anticipating and rethinking a company's business model while it is still strong to adjust to the rapid changes in the environment and technology.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case, instructor's manual, and synopsis were anonymously peer reviewed and accepted by the North American Case Research Association (NACRA) for its annual meeting, NACRA 2022, Niagara Falls, Ontario, Canada. October 6-8, 2022. All rights are reserved to the authors and NACRA. © 2020 by Javier J. O. Silva, Enrique Chamas and Eduardo Catalan Villegas. Contact person: Javier Silva, IAE Business School, Austral University- Mariano Acosta s/n Ruta Nac. 8 (B1629 WWA) Pilar – Buenos Aires - Argentina, [javierjosilva@gmail.com](mailto:javierjosilva@gmail.com)

## **WARNER BROS: WONDER WOMAN 1984 REMAKING THE FUTURE**

Malay Krishna, S. P. Jain Institute of Management & Research

Sunny Arora, S. P. Jain Institute of Management & Research

Garvita Dutta (student author)

### **Case Objectives and Use**

This case can be used for a graduate course in business that deals with marketing and distribution, channel management, or the entertainment industry. In a post-pandemic world, we expect this case might be especially relevant as the digital disruption during the pandemic gives way to the return to a 'new normal'. Specific objectives are:

- Learn about the evolution and prevalence of channels available to a movie production business during the current times.
- Understand segmentation, targeting, and positioning of movies in the US.
- Analyze the types of channels available to a movie production company to distribute their content.
- Formulate strategies to deal with conflicts arising while practicing multichannel marketing.

### **Case Synopsis**

This case outlines an unprecedented move by Warner Bros (Warner), a large movie production company based out of Los Angeles, California, USA, in 2020-2021. In releasing their title 'Wonder Woman 1984' to an on-demand, streaming service (HBO Max) at the same time as theaters, Warner had broken with tradition. The typical model for distribution of waiting a minimum of 12 weeks after release in movie theaters, before release to alternate distribution. Due to the COVID-19 (Covid) pandemic, movie theaters had been closed across the US, and the few that were open had to restrict capacity by \_\_ %. After Wonder Woman 1984 released in December, Covid vaccines had been effective in reducing infections in the US, and movie theaters were expected to reopen at full capacity in the summer. The case closes with the question of what CEO Sarnoff should do for the summer of 2021 and beyond.

[Briefly suggest the various moves that other players were making – other studios, OTT players, theaters. What should Sarnoff do, to navigate the uncertainty and dynamic environment?]

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## **CAVERTON: INTERNATIONAL STRATEGY OF SOARING INTO AFRICAN MARKETS IN TURBULENT WEATHER**

Adeniyi Damilola OLAREWAJU, Tecnologico De Monterrey, Mexico  
Sunday Abayomi ADEBISI, University of Lagos, Nigeria

### **Case Objectives and Uses**

This case concerns the internationalization and financial strategy of an indigenous Nigerian company - Caverton Offshore Support Group Plc (Caverton), in its quest to become a global player, starting from other African markets. Studying Caverton's internationalization effort appears apt due to increased focus on African firms that are gradually becoming multinational enterprises (MNEs). Undergraduate and postgraduate students of international business and strategic management are likely to better appreciate the challenges of internationalization, particularly from the perspective of a young, indigenous African company. The case should be helpful to students at the undergraduate and postgraduate/MBA levels, and could be used on owner-manager programs where participants are interested in international expansion. Students studying courses or modules in international business, financial strategy, entrepreneurship, strategic management, startup companies in emerging African markets, and organizational development should find the case useful.

Learning objectives include: knowledge application concerning geographic distance, psychic distance, and institutional distance; evaluation of benefits and challenges associated with equity-based foreign investment such as greenfield and brownfield investments; examination of foreign-market entry motives in respect of market-seeking motive, natural resource-seeking motive, efficiency-seeking motive, and strategic asset-seeking motive; assessment of organizational financial strategy as it relates to retained earnings and shareholders' dividend; application of multi-country macroeconomic and statistical data in analyzing internationalization decisions.

### **Case Synopsis**

On the morning of Tuesday, 30th March 2021, the founder and chairman of Caverton Offshore Support Group Plc (Caverton) - Mr. Aderemi Makanjuola – decided he had to make a decision concerning the future of the organization before he met with other members of Caverton's Board of Directors, ahead of the company's annual general meeting scheduled for May 2021. In its short history of offering a fleet of modern aircrafts and offshore support vessels, Caverton has emerged as a market leader in the offshore support and logistics provider industry in Nigeria and the next step in its expansive growth strategy is to seek additional high growth foreign markets, particularly in Africa. However, there appears to be a major challenge. The company's profit before tax and earnings per share had declined while Nigeria's major economic indicators also suggested an economic recession was imminent. Still, a decision had to be made about Caverton's internationalization strategy and entry-mode choice. Using distance as a factor, what countries should the organisation expand to and should it consider acquiring companies in its chosen markets or employing wholly-owned operations? In addition, Mr. Makanjuola had to decide if a dividend should be declared for the financial year end 2020. Further, as metaphor for turbulent weather, he is not certain the extent to which the COVID-19 pandemic would affect his intentions. Students will step into the shoes of Mr. Makanjuola as he and other members of Caverton's Board of Directors attempt to lead the organization into its desired future.

Keywords: Internationalization, international expansion, distance, entry-mode, dividend pay-out, financial strategy, Nigeria, Africa.

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## **PAYMOB: TRANSFORMING DIGITAL PAYMENTS IN EGYPT AND THE REGION FOR CASHLESS SOCIETY**

Ayman Ismail, The American University in Cairo

Seham Ghalwash, The Technical University of Denmark DTU Entrepreneurship; The American University in Cairo

Maria Ballesteros-Sola, California State University Channel Islands

Ahmed Dahawy

The American University in Cairo; Harvard Business School Case

### **Case Objectives and Use**

The case is suitable for upper-level undergraduate or MBA courses in International Business (IB) and Global Management (GM), entrepreneurship, and/or strategic management courses. We recommend using this case after the instructors have discussed the country selection and foreign entry strategies in class. After reading and discussing the case, students should be able to:

1. *Analyze* the fintech industry in emerging markets
2. *Distinguish* the growth strategies for startups in the hyper-growth phase, using the Ansoff Matrix
3. *Evaluate* and *select* geographical market for expansion (foreign country selection)
4. *Understand* the liability of foreignness concept

### **Case Synopsis**

In 2015, Islam Shawky, Alain Al-Hajj, and Mostafa Menessy founded Paymob in Egypt, a fintech start-up providing technological financial solutions to consumers and merchants in the country. The company had grown into one of Egypt's largest digital payment providers by deploying infrastructure and technologies that empower the underserved with access to financial services. In 2021, PayMob had gained a lot of support from venture capital investors that ended with closing the largest in Egypt Series A fund of \$18.5 million led by Dubai-based VC firm Global Ventures. Although Paymob had already reached great success in Egypt, the founders' vision is now to become the regional leader of digital payments with a special focus on SMEs. So, they are considering regional markets similar to Egypt's, such as the Kingdom of Saudi Arabia (KSA), a market with a lot of structure but a lot of competition as well, and Pakistan, a market with a lot less competition but also relatively unstructured. The founders found themselves in early 2022 deciding between these two markets in preparation for the next round of Series B \$50M funding. This case helps students to conduct industry analysis, assess and apply growth strategies and foreign market entry strategies in emerging markets in the fintech industry.

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## **BRICKS OR CLICKS: DAWLANCE (PRIVATE) LIMITED'S CHANNEL DILEMMA**

Farah Naz Baig, Assistant Professor, IBA, Karachi

Rija Alam (student author), Aafia Khan (student author), Zameen Lakhani (student author), Sarah Naqvi (student author), Areeba Khan (student author). Student authors helped in developing the first draft of the case under the supervision of the instructor.

### **Case Objectives and Use**

The main objective of this case is to teach the concepts of multi-channel marketing, channel design, consumer decision journey and research shopping by discussing a brand from the home appliance category in the context of Pakistan. By the end of this case discussion, the students will be able to compare and contrast consumer decision journeys of multiple categories, recognize the requirements of e-commerce enabled websites, recognize the requirements of online store set-up at a market place and understand the concept of multi-channel marketing and how do different channels complement each other. This case can be taught at the MBA level (first year), undergraduate/ BBA third year or fourth year students. The case is positioned at the beginning of the semester. This case can be taught in a 90-minute class.

### **Case Synopsis**

Hasan Jamil, chief marketing officer at Dawlance faced a strategic dilemma during the Covid pandemic. Founded in 1980, Dawlance was the leading home appliances company in Pakistan. Its products were distributed mainly through the dealer network to the end customers. The coronavirus pandemic led to lockdowns and disruption in the availability of goods. Jamil knew that this was the right time to go digital with their high-ticket appliances business. However, that move may create a backlash from the existing 1800 distributors spread all across the country. Covid was at its peak and he had to find a solution for the stagnant sales. Should he create an e-commerce platform or should he utilize the traffic of the biggest marketplace, Daraz, or should he use a combination of channels? His core target group included married couples in urban and semi-urban centers. Would online channel addition help him retain customers who were having issues during the pandemic? What would happen when things get back to normal after the pandemic? His team was unwilling to add the online channel option as they believed it would lead to a dealer backlash and loss of dealer support. Should Jameel take this risk of working on the new channel at the expense of distributor disgruntlement? He had three months and five million rupees to get the sales back on track.

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# **CROISSANTS FOR BREAKFAST AT TIFFANY'S? CHALLENGES AFTER THE LVMH TAKEOVER**

Ram Subramanian, Stetson University  
Grishma Shah, Manhattan College

## **Case Objectives and Use**

1. Understand the impact of history/origin stories on current organizational culture for both Tiffany and LVMH.
2. Evaluate the evolution of acquisition talks between LVMH and Tiffany to understand pre-acquisition goals and challenges.
3. Apply Hofstede Cultural Dimensions and Meyer's Cultural Map to organizational challenges faced by both firms' post-acquisition.
4. Synthesize the impact of organizational and cultural fit on LVMH's strategic goals for Tiffany.
5. Understand China's cultural profile to brainstorm on what kind of products/marketing strategies would work in China.

This case is appropriate for undergraduate and MBA courses addressing dynamics of global business, strategy, and culture, such as Cross-Cultural Management, International Business, Global Strategy, and Organizational Behavior.

## **Case Synopsis**

On April 12, 2022, LVMH Moët Hennessy Louis Vuitton (LVMH), the global leader in the personal luxury goods, released first quarter earnings for 2022, highlighting their latest acquisition, the New York City-based Tiffany & Co (Tiffany). Tiffany had performed well due to growth in demand in the U.S. following two difficult years because of the global Covid-19 pandemic. This underscored the fact that Tiffany was still largely dependent on the U.S. market, which was a cause for concern for CEO, Anthony Ledru, who was brought in by the parent LVMH to exploit the high growth market for personal luxury goods in China and other parts of Asia-Pacific. LVMH's acquisition of Tiffany had been completed on January 7, 2021, and LVMH was expecting the turnaround of the largely U.S.-centric Tiffany to show results by shifting focus to the rapidly growing China market. Nonetheless, Ledru's ability to address the China market for Tiffany was constrained by culture clashes between the company's French owners and management team and its large cadre of U.S.-based employees. Employees chafed at what they felt was an autocratic management style and at the company's insistence on limits to a work-from-home policy that was instituted in early 2020 because of the pandemic. Ledru and his top management team had to quickly overcome the employee issues and make significant inroads in the China market.

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## **NB. DISTILLERS: HOW TO PROMOTE THE BRAND?**

Ebrahim Mazaheri, Wilfrid Laurier University

### **Case Objectives and Use**

This case is designed for use in an undergraduate or graduate marketing course, most likely in introductory or marketing communication courses. Instructors can use different marketing communication models/frameworks and apply them to this case. Furthermore, the case allows students to apply key marketing concepts such as positioning, segmentation and targeting.

The learning objectives for this case are as follows:

1. Understanding of the need for positioning within a marketing strategy;
2. Demonstration of the importance of brand awareness.
3. Creation of communication strategies that are consistent with the brand position
4. Importance of customer journey in developing communication strategies

### **Case Synopsis**

Neeraj Bakshi bought a vodka distillery in 2019 in Mississauga, Ontario, Canada. The distillery operated with 4-5 employees with a production capacity of 4000-5000 bottles per month. The previous owner was happy with the production level and didn't want to expand. However, Neeraj had bigger dreams for the distillery. That is why he purchased a 6-acre land in Welland, Ontario, to increase the production capacity. The city of Welland is a small town with a population of 57,000. It is about a 1.5-hr drive from Toronto and 45 minutes from Buffalo, N.Y.

Today, the NB. Distillers produce three types of Vodka, two types of whiskey, and 1 type of Gin. NB. Distillers' Red Admiral Vodka is already sold through LCBO, and the Chak De Whiskey is in the final stages of getting approval to be sold at LCBO.

Neeraj has invested significantly in NB. Distillers and wants to see nothing but success. He has done advertisements on billboards, bus shelters, and radio. He wanted to spend the communication budget more strategically and was open to trying new ideas; what segment audience should NB Distillers target? How should he position the distillery? What other promotional tools help him achieve greater brand awareness?

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## Organizational Behavior/Human Resource Management Cases

**Track Chair:** Mike Annett, MacEwan University  
**Co-Chair:** Charles Kalnbach, University of Oregon  
**Co-Chair:** Bruce Thomson, MacEwan University

Cases	Authors
Personify by Wishyogi: Striving to Create an 'Aha!' Candidate Experience	Jyotsna Bhatnagar
Rich Nagel: Recruiting and Coaching Productive Employees	Stuart Rosenberg
Not What He Envisioned: The Impact of a Mishandled Harassment Investigation	Scott Rankin Melanie Reed
Democratic Lotteries: Should the Lawrenceville School Swap Student Elections for Lotteries?	Meredith Woodwark Stephen D. Risavy
The Veteran and the Election	Terry McGovern
Sonja Hoel – Starting a Career	Paul Seaborn



## PERSONIFY BY WISHYOGI: STRIVING TO CREATE AN ‘AHA!’ CANDIDATE EXPERIENCE

Jyotsna Bhatnagar, MDI Gurgaon

### Case Objectives and Use

The case will help students achieve the following objectives:

- To understand the use of design thinking to create a meaningful candidate experience
- To identify the difference between chatbots and AI/natural language processing (NLP) for building the candidate experience
- To learn about the use of employee advocacy for hyper-personalizing the brand experience
- To identify how data storytelling is used in this context

### Case Synopsis

It was June 2021, and Neha Mathur and Debi Kar were elated to learn that their start-up platform, Personify, had won the 2021 *CIO India Review* Award as the most promising SaaS start-up. Their company had been judged on its thorough research of industry trends and market analysis by an eminent panel of CEOs, CIOs, VCs, and analysts, alongside the *CIO India Review* team. The award listing stated: “We believe the enlisted companies are best positioned to carry businesses forward towards their digital transformation journey.”

Winning the award was exciting for Mathur and Kar. Their eyes twinkled with belief in their innovative product, which they had identified early in their start-up journey. With that fervor, the founding team had been working on the latest concerns raised by their clients. Over a cup of virtual coffee, the clients shared stories of facing massive recruitment drop-outs, besides new employee attrition. The great resignation story was common to everyone, and the team wondered how to firm up the offer-to-joining ratio and candidate experience for their clients. How could their clients be turned into destination employer brands?

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**RICH NAGEL: RECRUITING AND COACHING PRODUCTIVE EMPLOYEES**  
Stuart Rosenberg, Monmouth University

**Case Objectives and Use**

The case is suitable for courses in undergraduate courses in Human Resources Management to apply the concepts of recruitment and coaching. It is also suitable for undergraduate courses in Organizational Behavior to apply the concepts of motivation theory and employee productivity.

**Case Synopsis**

Rich Nagel, the owner of the RE/MAX real estate agency in Monmouth Beach, New Jersey has pitched in April 2022 an idea to one of his agents, Bob Crater, to help Bob improve on his performance. Another agent in the office, Tim Landy, also was having trouble with his performance, and Rich was recommending that Bob and Tim work together. Real estate agents typically worked on their own, but Tim and Bob had different strengths that Rich felt they each could benefit from by working together. Tim, who was in his twenties, worked hard at prospecting for sales, but he hadn't been able to close on them; Bob, who was in his fifties, had avoided prospecting, but he had a great gift of gab and was a natural salesman. Rich was recommending a pairing up strategy for Tim and Bob, an idea that Tim had recently agreed to. Bob, however, was unsure whether he should accept this recommendation, which would involve splitting his commissions with Tim. Rich indicated to Bob that if he wouldn't agree to pairing up with Tim, then perhaps he'd agree to at least scheduling time to meet with Tim in a peer-to-peer learning strategy. He also assured Bob that he didn't have to agree to either strategy. He made his feelings clear, though, that Tim and Bob were both falling short individually and that he wanted to see their results improve by working together. Bob appeared to be put off by the idea of working together with Tim in any capacity, but he indicated to Rich that he would consider both strategies and get back to him after the weekend.



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## **NOT WHAT HE ENVISIONED: THE IMPACT OF A MISHANDLED HARASSMENT INVESTIGATION**

Scott Rankin, Thompson Rivers University  
Melanie Reed, Thompson Rivers University

### **Case Objectives and Use**

This case is targeted at students in undergraduate or MBA courses in Strategic Human Resource Management or Leadership. This case, based on an actual event, illustrates the dangers for managers, boards, organizations and respondents when claims of inappropriate behaviour are mishandled or miscommunicated. It also demonstrates the need for senior leaders to be skilled in dealing with the impacts of these behaviours. From outward appearances, it seemed that the leaders of the organization, in particular the President, focused too much on ensuring justice for the respondents and failed to appreciate or address the impact on the broader organization. It highlights the several dimensions of justice: procedural, distributional and interpersonal/informational (Colquitt, 2008). It also provides a vivid example of how leaders should address such harm: Acknowledge, Apologize and Act (Baumann, 2011).

After discussing and analyzing this case, students will be able to identify appropriate management and communication practices for dealing with sensitive workplace issues such as allegations of bullying, harassment and discrimination. They will also be able to recognize key leadership and communication principles to ensure fairness and justice in organizations and be able to develop responses required by leaders to move past the harm these allegations and the mishandling of them can create.

### **Case Synopsis**

The President of Thompson Rivers University (TRU) in Kamloops, Canada, Brett Fairbairn faced backlash and scrutiny for the mishandling of a harassment and discrimination investigation into two of his senior leaders. In November 2021, two local media outlets released details of the allegations that were brought to the attention of the President and Board of Directors months earlier. These allegations became a public embarrassment for the university and also threatened to undermine the relatively new President's authority and his ability to pursue his recently articulated values and strategy called, 'Envision.'

The case outlines the timeline of events, as reported via TRU's public website and local news media, as well as via social media posts from interested parties. It illustrates the risks for managers, even in large organizations who feel well-prepared and competent to deal with such issues, when policies are missing key provisions or when actions are not taken consistent with an organization's policies and, in this case, its stated values. The public statements by the President of the university and the chair of its Board of Governors aimed at defusing the situation had the opposite effect, further illustrating the minefield that management must navigate when internal matters become external news. The President is faced with a decision on how to respond to his varying stakeholders when his leadership and the vision of the university are at stake.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2022 Conference, Niagara Falls, Ontario, Canada, October 6-8, 2022 © 2022 by Dr. Scott Rankin and Melanie Reed. Contact person: Dr. Scott Rankin, Thompson Rivers University, 805 TRU Way, Kamloops, British Columbia, V2C 0C8, 778-471-8466, [srankin@tru.ca](mailto:srankin@tru.ca)

## **DEMOCRATIC LOTTERIES: SHOULD THE LAWRENCEVILLE SCHOOLS WAP STUDENT ELECTIONS FOR LOTTERIES?**

Meredith J. Woodwark, Wilfrid Laurier University

Stephen D. Risavy, Wilfrid Laurier University

### **Case Objectives and Use**

This case is designed for undergraduate or graduate courses in organizational behavior and human resource management (OB/HRM) when discussing the topics of diversity management, decision-making and leadership. Overall, the case relates to how decision-making systems influence organizational outcomes, sometimes in a covert manner with possible negative implications. The case can be used to examine how the commonly accepted decision-making processes in organizations believed to be fair may inadvertently lead to suboptimal or unfair outcomes. The case contrasts the merits of a rarely used decision-making system, sortition (e.g., selection by stratified random chance), with those of elections and managerial discretion. Best used towards the end of a course, after this, case students should be able to:

1. Understand the pros and cons of several decision-making processes (i.e., elections, democratic lotteries, manager discretion) and how they can impact important organizational outcomes. (LO1)
2. Evaluate whether and how lottery-based systems could be applicable and appropriate to the management of organizational workplaces to overcome known decision-making errors and biases. (LO2)
3. Assess the potential short- and long-term impact of using a lottery-based decision-making process in a variety of organizational decisions. (LO3)
4. Explain and justify an opinion about whether democratic lotteries or decision-making by chance in organizations such as The Lawrenceville School should be seriously considered. (LO4)

### **Case Synopsis**

Best-selling author and podcaster, Malcolm Gladwell, brought democracy activist Adam Cronkright to the Lawrenceville School in Princeton, New Jersey, for his podcast to debate the merits of student government elections vs. democratic lotteries with 20 of the school's high school students. Based on his work implementing lotteries in schools in Cochabamba Bolivia, Cronkright contended that democratic lotteries were a fairer way to select student representatives than elections because they resulted in student councils that better reflected the school's diverse population compared to traditional elections. He argued that elections privileged the few students who were comfortable performing during a campaign and willing to face peer rejection, and amounted to popularity contests where few students participated, the students elected were not necessarily the best leaders, and the set of elected representatives did not reflect the diversity within the population. Cronkright outlined the findings of his tests of the lottery system where he found that lottery selected councils took on more challenging issues, discovered unrecognized leadership talent, and was preferred by students and teachers. Interested in other possible applications of the concept, Gladwell explored its potential use for selecting the student government at the Lawrenceville School, as well as for uses like awarding research grants at the National Institutes of Health (NIH). After the debate, the Lawrenceville students must decide whether to keep elections or switch to lotteries.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2022 Conference, Niagara Falls, Ontario, Canada, October 6-8, 2022. © 2022 by Meredith J. Woodwark and Stephen D. Risavy. Contact person: Meredith Woodwark, Wilfrid Laurier University, Waterloo, Ontario, Canada, [mwoodwark@wlu.ca](mailto:mwoodwark@wlu.ca).

**THE VETERAN AND THE ELECTION**  
Terry McGovern, Business, University of Wisconsin Parkside

**Case Objective and Use**

This case is useful in an undergraduate or graduate course that addresses career choices. The case requires students to consider the professional and personal trade-offs that factor into professional decision-making. Students are introduced to frameworks including the Ethical Decision-Making (EDM) model and the Weighted Scoring Model Approach (WSMA). The EDM model is used to help students frame the decision through an ethical lens to help ensure the integrity of the decision. Once the ethics are understood, the WSMA is useful as a rational assessment of the advantages and disadvantages of each option. Discussion beyond the personal and professional factors listed in the case is encouraged and may include other considerations such as potential mental-health concerns for family members, negative impact to his business, the short-term and long-term consequences that come with being a politician, potential mentors he may have turned to for advice, and Prichard's relationship with his father, a diehard Republican.

**Case Synopsis**

In late November of 2012, Todd Prichard, an attorney from Charles City, Iowa, was trying to decide whether to run for Representative to the Iowa State House of District 52, located in northeast Iowa and covering all of Floyd and Chickasaw Counties and a small part of Cerro Gordo County. Prichard was a Major in the Iowa National Guard, married to his spouse Ann, and father of 3 young children. He ran his own general practice law firm located in downtown Charles City. The original election took place on November 2nd of 2012, but the winner, Democrat Brian Quirk, opted to step down in mid-November due to a job change. A Democratic primary, called a contested convention, was scheduled to take place in three weeks' time, on December 11th. Prichard, a political unknown among the district Democrats, needed to make a quick decision.



The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching notes were anonymously peer reviewed for presentation at the NACRA 2022 Conference, October 6-8, 2022, by Terry McGovern. Contact Person: Terry McGovern, Business, University of Wisconsin Parkside Email: mcgovert@uwp.edu

## **SONJA HOEL – STARTING A CAREER**

Paul Seaborn, McIntire School of Commerce, University of Virginia

### **Case Objectives and Use**

This case is designed for use in courses that involve leadership, career management or human resources. It is targeted for undergraduate students as well as early-career graduate students. It describes the early-career experiences of one individual, recent undergraduate business student Sonja Hoel, to introduce basic issues about job searches, career choices and occupations/professions as well as more complex issues related to diversity, equity, inclusion, (DEI) as well as discrimination in the workplace. Through the case, students will gain greater familiarity and experience with the early-career opportunities and challenges experienced by others. This experience can help inform how students manage their own career decisions and their general views on DEI and HR/workplace issues.

### **Case Synopsis**

The case study focuses on the real-life experiences of Sonja Hoel as she chooses between multiple employment options for her first full-time job after graduation from an undergraduate commerce program. Hoel's job choices differ significantly in terms of geographic location (Europe or US), industry and role. One of the options would place Hoel in a very male-dominated work environment and another option is strongly opposed by her parents. The actual events of the case took place in 1988, but the specific time frame is not highlighted in the case itself as the basic issues remain relevant decades later. As described in the instructor's manual epilogue, Hoel decided to accept a position in the male-dominated private equity industry and went on to become a highly successful female pioneer in that field.



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**Social Impact and Sustainability Cases**  
**Track Chair:** María Ballesteros-Sola, California State University Channel Islands

<b>Cases</b>	<b>Authors</b>
Amavida Coffee Roasting: The Quest to Be “Coffee Forward”	Ram Subramanian Michelle DeMoss
Bat Travels: A Case of Sensory Gateways	Nidheesh Joseph Mueen Ahmed Sankalp Pratap
Heroic Gardens	Amy Lavin Sheri L. Lambert
Worldcoo: Creating a New Market for Consumer Solidarity	Alfred Vernis Alessandro Cipolla Juan Pablo Casadiego
Aisle: A Canadian B Corp Pivots to Scale its Impact	Maria Ballesteros-Sola Kyleen Myrah Kerry Rempel Stephanie Raible

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## **AMAVIDA COFFEE ROASTING AND TRADING COMPANY: THE QUEST TO BE “COFFEE FORWARD”**

Ram Subramanian, Stetson University  
Michelle DeMoss, Stetson University

### **Case Objectives and Use**

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

1. Understand the concept of strategic positioning
2. Apply extant strategy frameworks to develop options for growth and profitability
3. Evaluate the interplay of social and market forces in business decisions.

This case is about a small company dealing with strategic positioning in a competitive marketplace. A singular feature of the case is that the focal company, Amavida, is a B Corp with a strong social ethos captured in its many initiatives, such as its above market pricing for coffee beans, its on-the-ground help to coffee growers (as part of a cooperative), its desire to promote sustainability among small local players by sourcing and selling sustainable coffee-related products, and its decision to continue with full employment even as the country and the world were battered by the pandemic. The case is suitable for an upper-level undergraduate course in strategy for a module that focuses on business-level strategy. The assumption is that students would have been exposed to the idea of strategy and its external and internal contexts, in addition to the concept of stakeholders prior to being asked to analyze and discuss this case.

### **Case Synopsis**

In January 2021, Amavida Coffee Roasting and Trading Company, a Florida-based B Corp and coffee retailer and wholesaler faced an issue of competitive positioning in a crowded market. After operating on a firefighting mode for all of 2020 due to the Covid-19 pandemic, Daniel Bailey, Amavida's co-owner and CEO was preparing for the upcoming strategic planning meeting whose goal was to develop actions to grow the company. Bailey and his management team were wondering how to capture Amavida's many social initiatives including being the voice of coffee growers from around the world into a coherent positioning strategy.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and instructor's manual were anonymously peer reviewed for presentation at the NACRA 2022 Conference, Niagara Falls, Ontario, Canada, October 6-8, 2022. © 2022 by Ram Subramanian and Michelle DeMoss. Contact person: Ram Subramanian, Stetson University, 421 N. Woodland Blvd. Unit 8398, DeLand, FL 32723, 386-822-7956, [rsbram1@stetson.edu](mailto:rsbram1@stetson.edu).

## **BAT TRAVELS: A CASE OF SENSORY GETAWAYS**

Nidheesh Joseph (student author), Indian Institute of Management Tiruchirappalli  
Mueen Ahmed (student author), Indian Institute of Management Tiruchirappalli  
Sankalp Pratap (faculty supervisor), Indian Institute of Technology Jodhpur

### **Case Objectives and Use**

This case is suitable for teaching multiple facets of entrepreneurship for MBA and Executive MBA classes in core Entrepreneurship and Strategic Management courses. It can also be used for elective courses like Social Entrepreneurship and Tourism Management. The case is equally suitable for participants with and without prior work-experience. This case can be used after the basics of entrepreneurship and strategy are covered. The instructor can control the intensity of case discussion based on the level of work-experience of the participants. The case invites students to discuss the various aspects of a creative and novel startup in the travel and tourism industry in India, and suggest recommendations for the founders to scale and sustain this unique venture. After discussing this case, the students will be able to:

- (1) Evaluate how capabilities help an enterprise to achieve its aspired outcome.
- (2) Differentiate conventional and unconventional entrepreneurship based on the underlying passion of the founders.
- (3) Investigate the underlying logics of entrepreneurial action in creating successful enterprises.
- (4) Identify the ways in which entrepreneurship can be used to achieve social inclusion.

### **Case Synopsis**

Bat Travels is a travel and tourism company (based in Mumbai, India) founded by Ritu Sinha and Divya Saxena on November 2017 to curate sensorial based getaways with a special focus on the visually impaired (VI) travelers. In India, there exist only a handful of travel companies (Planetabled, Enable Travel, Specialcare Holidays) catering to the physically challenged tourists and travelers but none catering exclusively to the VI travelers. To differentiate themselves from other itinerary oriented travel companies, Bat Travels attempts to provide both the sighted and the unsighted with a rich destination-based sensorial (auditory, touch, smell, taste) experience. Bat Travels encourages sighted travelers to act as 'travel pals' for the unsighted travelers. The case refers to a time (July 2019) when BAT travels has already made seven trips, with significant effort from its co-founders, but there appear to be concerns around the sustainability of the venture and its ability to generate profits. Bat Travels is yet to raise significant profits from their trips or gain traction among the VI community in India. The personal funds of the founders are depleting fast, VI participants are only below 20% of the total participants and the founders are finding it hard to focus on the strategy and marketing of the company along with managing the daily operations. The case invites students to discuss the various aspects of this creative and novel startup in the travel and tourism industry in India, and suggest recommendations for the founders to scale and sustain this unique venture. This is a real-life decision making case based on primary data collected through interviews, participant observation of a conducted trip, and perusal of relevant secondary data.

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**HEROIC GARDENS**

Amy Lavin, Temple University  
Sheri L. Lambert, Temple University

### **Case Objective and Use**

This case is suitable for social entrepreneurship courses, nonprofit management courses that emphasize earned income strategies, and digital marketing courses, especially those that focus on organizations with limited resources. It works best at the undergraduate level, though can be adapted to graduate level courses.

The students will learn about:

- The opportunities and challenges specific to nonprofit organizations that strive to expand and grow in terms of revenues and programs.
- The potential and challenges nonprofit organizations using SWOT as an analysis tool.
- How to apply strategy concepts to develop marketing strategies for a nonprofit organization while considering risks and mitigating actions.
- Evaluating and applying digital marketing tools to address resource disadvantages, transform a go-to-market strategy, and enhance volunteer and donor engagement

After analyzing this case, students will be better equipped to have extended detailed conversations about social entrepreneurship management options, trade-offs between options and detailed measurement plans.

### **Case Synopsis**

As Heroic Gardens a small-scaled non-profit organization whose focus was to help U.S. Veterans experience the healing power of nature, was looking to the future, it was thinking about its rapid growth in the past, and the challenges and opportunities that lie ahead. Founded in 2018, Heroic Gardens was a unique organization in the Philadelphia, Pennsylvania area. Heroic Gardens was dedicated to working on the land and in neighborhoods with Veterans. Heroic Gardens was founded by Collie Turner, a professional Marketer with 20+ years of corporate experience. Turner was a granddaughter and daughter of Veterans and dedicated organic farmers and conservationists. Turner began the nonprofit with the dream of making an impact by combining horticulture and its effect on a person's own healing process. At the time it was founded in 2018, there were many other nonprofits focused on US veterans and their causes, but few focused on Horticultural Therapy. Heroic Gardens was developed to play a role in helping the staggering numbers of Veterans – who return from military service with forms of PTSD, anxiety, depression and other invisible wounds of war – heal through the use of therapeutic horticulture.

As the beneficiaries of Heroic Gardens' services grew, especially through their pivot to Mission: Windowsill during the Coronavirus pandemic, Turner needed to grow her funding. The mission was clear, however additional revenue streams were needed in order to expand its program offering and reach within the community. In this case, Heroic Gardens' founder Collie Turner was preparing for a review meeting with Heroic Gardens' Board of Directors. Turner knew there were opportunities to increase revenue beyond individual donations and corporate partnerships. And she had to look for ways to lean into digital marketing to grow the awareness of her nonprofit. She had only a few weeks to complete her assessments of Heroic Gardens' assets and marketing strategy to prepare a recommendation to the Board.

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## **WORLDCOO: CREATING A NEW MARKET FOR CONSUMER SOLIDARITY**

Alfred Vernis, ESADE Business School (faculty supervisor)  
Alessandro Cipolla, ESADE Business School (student author)  
Juan Pablo Casadiego, ESADE Business School (student author)

### **Case Objectives and Use**

This case has been designed to be used in social entrepreneurship courses in both MBA and MSc-level programs, and aims to open discussion around purpose-driven organizations, social impact strategy, and internationalization of social impact start-ups. The authors have tested the case in different class settings, including Social Entrepreneurship courses at the MBA and MSc levels.

The educational purpose of the paper is to empower students to:

- Manage the integration of profit and purpose in an impact tech business model.
- Create successful business models by applying Blue Ocean strategies in a social enterprise context.
- Understand the strategic relevance of building strong partnerships with customers and stakeholders to foster a greater impact.
- Analyze the key factors influencing whether or not an organization is ready to scale.
- Face the tensions between financial and social objectives when scaling a social enterprise and recommend a course of action.

### **Case Synopsis**

In April 2022, Sergi (CEO) and Aureli (COO), co-founders of Worldcoo, a Catalan social impact tech startup that offers fundraising solutions for Non-Governmental Organizations (NGO) projects through a round-up donation system, are considering options for scalability and growth. Since the “redondeo solidario” (solidarity roundup) was launched in 2017, the startup has contributed funding to over 620 (2021) projects of local and international NGOs. For Worldcoo, one of its key successes has been the establishment of B2B relationships with diverse merchants and payment service providers (PSP) to provide all the technological and legal support to the retailers deploying their rounding-up technology. To become the round-up leader in Spain, the startup has developed partnerships with large retailers such as Condis and Eroski supermarkets, and MasterCard.

In spite of the global COVID-19 pandemic crisis that affected physical retail, the company managed to increase revenues from €1.2 to €2 million in 2021. With scalability in mind, Sergi and Aureli aim to reach €5-5.5 million in revenue by 2022 and to double again in 2023, which presents challenges and opportunities for Worldcoo’s strategy. They had to decide how Worldcoo would face such growth while maintaining relationships with its existing customers. The options under consideration were: (1) to increase its 5% share of the domestic Spanish market (scale deep), (2) to scale through existing partners and/or network (scale across), and (3) to consider different possibilities of expanding overseas (scale up).

With its current business model, Worldcoo has a clear purpose: to fund social and environmental projects while providing full traceability of the in-store donations. This raises the tension on scaling operations and achieving economic sustainability while preserving its purpose-driven strategy.

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## **AISLE: A CANADIAN B CORP PIVOTS TO SCALE ITS IMPACT**

Maria Ballesteros-Sola, California State University Channel Islands

Kyleen Myrah, Okanagan College

Kerry Rempel, Okanagan College

Stephanie Raible, University of Delaware

### **Case Objectives and Use**

This case is geared for both upper-level undergraduate and graduate courses. The case introduces students to the complexities of operating a social enterprise in a competitive industry that requires navigating a commitment to its social mission and financial feasibility, while pursuing disruptive, systemic, social change. The case is suitable for courses in social entrepreneurship, social impact, social business, corporate social responsibility, and social innovation. The case provides students with an opportunity to analyze how a unique social enterprise in a challenging competitive landscape is approaching a new customer segment. The case introduces, among other, the concepts of menstrual equity, life cycle assessment, B Corp certification, and social procurement. Students that prepare the case and participate in the guided discussion should be able to:

1. *Identify* the positioning or value of social enterprises vis-a-vis other competitors in the same sector.
2. *Evaluate* the unique aspects and challenges of targeting an institutional customer through social procurement.
3. *Create* a proposal that synthesizes key arguments of a social enterprise's value proposition for a new institutional customer segment.

### **Case Synopsis**

Aisle is a founding Canadian B Corp that manufactures and sells sustainable and natural, reusable menstruation products directly to consumers. Independently women-owned since 1993, Aisle is a model of regenerative and inclusive business practices. In mid-November 2021, Madeleine Shaw (Shaw), Aisle's Co-Founder and Director of Partnership and Impact, was preparing a sales presentation for the University of Michigan. This was the first time pitching to an institutional client and much was at stake. Aisle had inspired period equity activists and entrepreneurs worldwide to seek menstrual justice and built the space for sustainable menstruation products. However, the growing investors interested in FemTech, combined with the negative impact of COVID on business operations, had taken a toll on its direct-to-consumer (DTC) business model. Given the ever-increasing interest of college students and young activists in menstrual equity, and the regulatory changes that were mandating educational institutions to provide free menstrual products, Shaw foresaw an opportunity to pivot from Aisle's DTC model to a business-to-business (B2B) approach as a way to create more significant social impact while expanding source of revenues. By putting themselves into Shaw's shoes, students will put forward a proposal that fully addresses the university's needs while demonstrating Aisle's organizational commitment to menstrual equity and environmental stewardship. The case allows the students to reflect on critical concepts such as social entrepreneurship, B Corp certification, menstrual equity, blended value, stakeholders' management, social procurement, and greenwashing.

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## Strategy and Policy Cases

**Track Chair:** Karin Schnarr, Wilfrid Laurier University

**Co-Chair:** Brent D. Beal, University of Texas at Tyler

### Cases

### Authors

Norwegian Cruise Lines' Sailing Pause During COVID-19

Chrissann Ruehle

Byjus: The Blue Ocean Strategy

Kushagra Sharan  
Anubha Shekhar Sinha

Victoria Mutual Building Society: Takes Stock

Sandra Shirley-Auxilly  
Paul Golding

N A C R A



**NORWEGIAN CRUISE LINES' SAILING PAUSE DURING COVID-19**  
Chrissann Ruehle, Florida Gulf Coast University

**Case Objective and Use**

Given its complex dense, and technical nature, this case study was prepared for an MBA level class such as Global Strategic Leadership or Global Business Strategy. This case would fit well in evidence-based decision making, strategic planning, strategic leadership, or corporate governance and ethics modules. Moreover, this case study could also be used in a Management Capstone course for undergraduates as it requires students to synthesize and apply learning across various business disciplines.

**Case Synopsis**

The case protagonist, Frank Del Rio, the CEO and President of Norwegian Cruise Lines, had just completed an interview with Goldman Sachs and he shared valuable insights into the cruise lines' experience during the pandemic. Investors stepped up and provided a financial lifeline which allowed Norwegian Cruises to remain afloat despite being shut down for 14 months. The date was May 27, 2021 and the cruise line had been on pause, waiting on approval from its regulator, the CDC, to proceed with sailing. Meanwhile, the cruise line followed the instructions provided by the CDC in preparation. The cruise line industry had been waiting patiently for 14 months for this decision. Unfortunately, the CDC had multiple delays and extensions along the pathway which further accelerated frustration for cruise industry veterans that were accustomed to working on long lead times. The other transportation industries were allowed to return to business earlier which further frustrated the cruise lines. This interesting case details the strategic positioning that Norwegian Cruise Lines took as it returned to sailing.



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## **BYJUS – THE BLUE OCEAN STRATEGY**

Kushagra Sharan (student author), Indian Institute of Management Kozhikode  
Anubha Shekhar Sinha (faculty supervisor), Indian Institute of Management Kozhikode

### **Case Objectives and Use**

The case study involves teaching the blue ocean strategy module. The learners will learn the value of innovation, the Eliminate-Reduce-Raise-Create (ERRC) framework, the implementation of the blue ocean strategy, and the six principles involved in constructing the blue ocean strategy. Following are the three teaching objectives:

- Explore the underground basis of how the uncontested market space was identified.
- Review and recognize the theories and guidelines for the decision making: Resource-based View and Blue Ocean Strategy.
- The emergence and appreciation/disparagement of organic and inorganic growth strategies.

The case is designed for the students pursuing MBA, executive MBA, and corporate executives.

*Intended Programs:* Regular MBA, Executive MBA;

*Intended Courses:* Strategic Management, Strategic Management of Innovation, Strategy Implementation.

### **Case Synopsis**

Byjus started alongside the organized group of competitors, such as the organizations like Career Launcher Educate Private Limited, Triumphant Institute of Management Education Private Limited, Aakash Educational Services Limited and Edurite, and the unorganized group of competitors such as the private tutors. It learnt soon that this was a red ocean. His video-based lessons and interesting goal-directed engaging content were two factors that showed promise in its early growth stage. As it moved ahead, more such features like adaptive learning and usage of learning management systems showed promise for growth as new markets got created. As Byjus kept experimenting and learning, it created an uncontested market space where other players had not entered or could not enter despite many years of Byju's single-handed run in that uncontested market space. This case deals with how Byjus created this marketplace.

Byju started classroom classes for Common Aptitude Tests (CAT) in 2007 and its video-based online sessions in 2009. Think and Learn Pvt Ltd was founded in 2011 with a strong base and focus on the K-12 segment. Byjus – The Learning App was launched in 2015. In 2018, the organization became India's First Edu-tech unicorn and was accredited with a decacorn status in 2020. With different products and acquisition sprees, the organization faced the problem of appropriate balance in the cognitive abilities of the resources, political and motivation hurdles, and the recruitment of the right resources. The most critical challenge was knowing the customer experience, allocating budgets for the allotment of resources to each vertical, and keeping the employees incentivized and inspired to achieve the targets, even though the market space was uncontested.

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## **VICTORIA MUTUAL BUILDING SOCIETY: TAKES STOCK**

Paul Golding, University of Technology, Jamaica W.I.

Sandra Shirley-Auxilly, Independent Business and Financial Consultant & Mentor

### **Case Objectives and Use**

This case is primarily designed for senior undergraduate and graduate courses in Strategy and Policy or Strategic Management. The case introduces students to the concept of demutualization, the conversion of a mutual stock company to a stock company and illustrates the key differences. Students may be asked to act as advisors to Courtney Campbell the CEO of VMBS. Students' recommendation should be based on a full analysis of the company's internal and external environment.

After reading the case study, students should be able to:

- Differentiate between two types of business structures: a stock company and a mutual company
- Understand the importance of strategic alignment
- Conduct a full analysis of a financial industry in a developing country
- Learn about the possible way of making strategic decisions: evaluate strategic options and make a recommendation.
- Understand the conversion of a mutual to a stock company
- Learn about the role of the IMF in developing countries (optional)

### **Case Synopsis**

The case describes the near meltdown of the Jamaican economy in 2012 with an estimated debt to gross domestic product (GDP) of 147%. To alleviate the crisis, the Jamaican government in 2013 signed an Extended Fund Facility of US\$948 million and subsequently in 2016 signed a precautionary Stand-By Arrangement of US\$1.64B with the International Monetary Fund (IMF). As a condition of the IMF loan, the Jamaican Government agreed to an economic reform agenda which required, *inter alia*, the harmonization of prudential standards across all deposit-taking institutions (DTIs) and consolidated supervision. Consequently, in 2014 Government of Jamaica (GoJ) passed the *Banking Services Act (BSA)*, which became effective September 30, 2015. Prior to the *BSA* the financial services sector was fragmented. Banks and deposit taking institutions were regulated by the Bank of Jamaica (BoJ), Jamaica's Central Bank; building societies though supervised by the BoJ were governed by the *Building Societies Act*; while credit unions were self-regulated through the Credit Union League.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2022 Conference, Niagara Falls, Ontario, Canada, October 6-8, 2022. © 2022 by Paul Golding and Ms. Sandra Shirley-Auxilly. Contact person: Paul Golding, Prof. Management Information Systems, University of Technology, Jamaica, 237 Old Hope Road, Kingston 6, Jamaica W.I., phone number:876 3187058, email: [pgolding@utech.edu.jm](mailto:pgolding@utech.edu.jm); Sandra Shirley-Auxilly, 1409 Meadowbrook Road NE, Palm Bay FL 32905, Phone number:954 7062587, email: [shirleysandra35@gmail.com](mailto:shirleysandra35@gmail.com).