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NACRA 2023 CONFERENCE CHAIR'S WELCOME

Welcome to the NACRA 2023 Annual Meeting in San Antonio, Texas! It is NACRA's 65th year, and we are proud to continue as the top global forum for faculty teaching with cases and those who write cases (or aspire to do so). This year, we received submissions from 24 countries: 94 full cases/papers, 47 start-up cases/research proposals, and 14 New Views sessions proposals – which demonstrates an increased global interest in our conference. We anticipate robust roundtable discussions in 11 subject tracks – please see the details in the schedule. NACRA conference is also a forum to discuss how the case method evolves and now includes new formats such as e.g. a hackathon, how it combines with other pedagogical methods such as e.g. experiential learning, and how it encounters new challenges such as e.g. AI and ChatGPT – check out our New Views sessions as well as the Pedagogy track presentations.

We have prepared a great program for you – starting with our opening plenary “Case Method Today: Impact on Theory Building, Students’ Learning, and Industry/Community Engagement – Insights from INSEAD Blue Ocean Strategy Institute.” The Institute was founded in 2007 in honor of the huge impact of W. Chan Kim and Renée Mauborgne’s theory of Blue Ocean Strategy, based on their global bestseller *Blue Ocean Strategy* (2005, 2015), which is recognized as one of the most impactful strategy books ever written. Professors W. Chan Kim and Renée Mauborgne have authored 78 cases listed in the Case Centre, including 4 prize-winning cases – having been placed as No.3 in the Case Centre’s list of Top 50 Bestselling Case Authors 2021/22. In March of this year, these professors were honored as two of the four leading thinkers – along with Harvard’s Michael Porter and the late Clayton Christensen – at *Harvard’s Business Review’s* 100th anniversary celebration. Our keynote speaker Oh Young Koo has been working with both of the professors for more than 15 years. Many of her cases are listed as bestsellers at Harvard Business Publishing. Join us on Thursday at 5 pm to hear about the case method at INSEAD and its impact on theory building, students’ learning, and community engagement. A cocktail reception will follow, and then we will have the conference dinner. On Friday, there will be various New Views sessions covering a wide range of topics in case teaching and case writing. Do not miss our CRJ Awards lunch on Friday, and the Conference Awards breakfast on Saturday. We will close the conference with Saturday’s panel session by case publishers to present to you the various publication opportunities for your case(s).

We are hosted this year at the spectacular Hyatt Regency Hotel on the San Antonio River Walk, a top tourist destination in Texas. The hotel includes the DASA Spa, ranked the #1 spa on the River Walk on TripAdvisor, a fitness center, a heated rooftop swimming pool and a sundeck. The River Walk is a world-renowned 15-mile waterway that is the largest urban ecosystem in the United States. I hope you and your beloved ones will enjoy the many attractions that this area offers: the San Antonio Zoo, the GO RIO cruises, the SEA LIFE Aquarium, the Six Flags Fiesta Texas, the Witte Museum of science, history, and culture all things Texas, the Tower of the Americas, LEGOLAND Discovery Center, and others.

This year, whereas the world continues to recover from a global pandemic, many people have been unable to join us either due to reduced funding or visa issues. Thank you so much to all of you who tried so hard to find a way to connect with us in person this year. I am so happy to see familiar faces again and also excited to meet new people! We will miss our colleagues who are unable to be with us in person this year, and I hope to see those who were unable to come this year at next year’s conference in Orlando, Florida. Many thanks to the authors, panelists, track chairs, co-chairs, and board members who have worked tirelessly to make this year’s conference work, despite obstacles. Thank you for your flexibility and commitment to NACRA, case writing, and each other.

My sincere appreciation to all of the track chairs and co-chairs for doing an amazing job by promoting NACRA, organizing pre-conference peer reviews in each track, communicating with authors, and making the roundtable discussions such a productive and meaningful experience for participants:

- ✓ Erin Pleggenkuhle-Miles, BingBing Ge, and Sonia Mehrotra (Entrepreneurship, Family, and Small Business)

- ✓ Karin Schnarr, Brent Beal, and Terry McGovern (Strategy and Policy)
- ✓ María Ballesteros-Sola (Social Impact and Sustainability)
- ✓ Jyotsna Bhatnagar and Bruce Thompson (Organizational Behavior and Human Resource Management)
- ✓ Silvia Cacho-Elizondo and Michael Goldman (Marketing)
- ✓ Clinton Daniel and G. Shankaranarayanan (Digital Technologies and Operations)
- ✓ Michele M. McGowan and Tanveer Shehzad (Accounting, Finance, and Economics)
- ✓ Tania Casado and Erica Berte (Cases Written in Portuguese)
- ✓ Shreya Mishra, Mike Annett, Ajoy K. Dey, and Anjan Ghosh (Pedagogy track)
- ✓ Vijaya Zinnoury and Theresa Coates (Corporate Governance and Ethics)
- ✓ Josep Lluís Cano Giner and Josep M^a Sayeras (Cases Written in Spanish)
- ✓ Grishma Shah (International Business)

I want to thank the leaders of tracks who continued in 2023 their support for NACRA, but due to travel/visa issues these tracks are regrettably not available this year in San Antonio:

- ✓ William X. Wei and Haibo Hu (Cases Written in Chinese)
- ✓ Christine Kratz, and Sabrina Hombourger-Barès (Cases Written in French)
- ✓ Aigerim Raimzhanova and Mariya Yesseleva-Pionka (Cases Written in Russian)

Our John Seeger Start-up Cases Workshop Chair Janis Gogan, along with the many mentors, also deserve big thanks. The Start-up Cases Workshop is invaluable for new case authors, as well as seasoned authors looking for guidance. Furthermore, we are excited to welcome to NACRA this year 8 recipients of the Paul R. Lawrence Fellowship Program by the Case Research Foundation led by Anne T. Lawrence.

On behalf of the NACRA community, I also want to thank our sponsors:

- Ivey Publishing (PRL sponsorship)
- SAGE Business Cases (PRL sponsorship)
- Emerald Publishing (PRL sponsorship)
- Michael Neidorff School of Business of Trinity University, San Antonio, Texas (general sponsorship)
- Goodman School of Business of Brock University, Canada (conference items)

My personal thanks for helping me organize this conference go to Nicole Amos (NACRA 2023 President), John D. Varlaro (Immediate Past President) A. Kay Guess (Treasurer), Eric Dolansky (CRJ Editor), Janis Gogan (Chairman of Advisory Board), and Anne T. Lawrence (CRF). I genuinely appreciate your guidance and insights. Finally, a sincere thank you from me, Melanie Reed (VP Programs-Elect), Lisa C. Facey-Shaw (VP Communications), and the rest of the Program Committee to all of you. Thank you for bringing your cases/papers/presentations to NACRA 2023.

If staying till Saturday afternoon, you are welcome to join the complimentary yoga session led by Olesia Nikulina, case writer from Netherlands, PRL 2023 Fellow, who is enthusiastic about sharing her other passions in life, such as yoga. This is what I ultimately love so much about the NACRA community: case writers/teachers are multi-talented, energetic, purpose-driven individuals who deeply care about students' learning, are generous in sharing best practices, and are eager to support their peers – both at a professional and a personal level. Once again, I welcome you to NACRA 2023, and I hope that this in-person experience will make a difference – leading to your continuous engagement with the NACRA community.



Olga Kandinskaia
 NACRA Vice President of Programs & Conference Chair 2023
 CIIM Business School of the University of Limassol, Cyprus, olga@uol.ac.cy

CASE RESEARCH FOUNDATION

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

Chair of the CRF Board: Anne T. Lawrence, *San José State University* (emerita)

The Case Research Foundation (CRF) www.caseresearchfoundation.org 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 ninth year of the program's operation. The CRF has now awarded a total of 82 fellowships.

In 2023, the Case Research Foundation awarded fellowships to the following 8 individuals:

Maryam Ahmed	Canada	University of Waterloo
Pallavi Awasthi	United States	Nova Southeastern University
Jose Cerecedo Lopez	United States	University of Texas San Antonio
Dalten Fox	United States	Boise State University
Jonathan Ross Gilbert	United States	Virginia Commonwealth University
Umer Hussain	United States	Wilkes University
Olesia Nikulina	Netherlands	Maastricht University
Mehrnoosh Reshadi	United States	California State University, Fullerton

In addition, this year the CRF welcomes to the conference the following members of the 2020-2022 cohorts of Paul R. Lawrence Fellows, who have had start-up cases or cases accepted for presentation:

Pardeep Singh Attri	India/Austria	Central European University
Viktor Golovii	Ukraine	National University of Kyiv
Belinda Nwosu	Nigeria	Lagos Business School
Juan Velez-Ocampo	Colombia	University of Antioquia
Adeniyi Olarewaju	Nigeria/Ireland	Maynooth University (Ireland)

The Case Research Foundation (CRF) is a nonprofit public benefit corporation. The first fellowships were awarded at the 2015 NACRA Annual Conference. The CRF is a 501(c)3 organization. Donations to the Foundation are tax-deductible, to the extent allowed by law. For more information on the program and how to donate, please go to www.caseresearchfoundation.org.

The Case Research Foundation thanks Emerald Publishing, Ivey Publishing, and SAGE Business Cases, as well as the many individual donors who have generously supported the work of the Case Research Foundation and its fellowship program this year.

Information on the process for 2024 applications will be available in February 2024 via CRF website.

OPENING PLENARY

“Case Method Today: Impact on Theory Building, Students’ Learning, and Industry/Community Engagement – Insights from INSEAD Blue Ocean Strategy Institute”

Presented by Oh Young Koo, Institute Executive Fellow, INSEAD Blue Ocean Strategy Institute, France

The BOSI Institute was founded in 2007 in honor of the huge impact of W. Chan Kim and Renée Mauborgne’s theory of Blue Ocean Strategy, based on their global bestseller *Blue Ocean Strategy* (2005, 2015), which is recognized as one of the most impactful strategy books. Professors W. Chan Kim and Renée Mauborgne have authored 78 cases listed in the Case Centre, including 4 prize-winning cases – having been placed as No.3 in the Case Centre’s list of Top 50 Bestselling Case Authors 2021/22. In March 2023, these professors were honored as two of the four leading thinkers – along with Harvard’s Michael Porter and the late Clayton Christensen – at *Harvard’s Business Review’s* 100th anniversary celebration. The keynote speaker Oh Young Koo has been working with both of the professors for more than 15 years. Many of her cases are listed as bestsellers at Harvard Business Publishing.

Oh Young Koo’s address at NACRA 2023 centered on the impact of case research in complementing the renowned Blue Ocean Strategy theory by professors W. Chan Kim and Renée Mauborgne. She spoke about the impact of cases on students’ learning, how the case method has been evolving at INSEAD into new formats (such as e.g. Blue Ocean Strategy Hackathon), and how cases help build connections between academia and industry as well as engage with local communities.

“Case research - not only theoretical and empirical research - has been foundational to our long research journey. Case research is a core component that informed our insights and theory of blue ocean strategy and beyond. We salute NACRA’s mission.”

- Chan Kim & Renée Mauborgne

JOHN SEEGER START-UP CASES WORKSHOP

Workshop Host: Janis Gogan, Bentley University (emerita)

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 Cassidy, Sam Houston State University
 Eric Dolansky, Brock University, Goodman School of Business
 James (Jim) Fisher, St. Louis University
 Armand Gilinsky, Sonoma State University (emeritus)
 Michael Goldman, University of San Francisco
 Anne T. Lawrence, San Jose State University (emerita)
 Rebecca Morris, Westfield State University
 Margaret (Peggy) Naumes, University of New Hampshire (retired)
 William (Bill) Naumes, University of New Hampshire (emeritus)
 Marlene Reed, Baylor University
 Kathryn S. Savage, Northern Arizona University
 Jeff Shay, Babson College
 Linda Swayne, University of North Carolina-Charlotte (emerita)
 Vijaya (Vi) Zinnoury, University of Denver

Case Author(s)	Start-up Case Title
Pardeep Singh Attri	Nalanda Academy: Digital Transformation
Pallavi Awasthi Fabienne T. Cadet Eleanor Lawrence	A Business School's Road to AACSB
Kimone Brown Rosalie Sawyers	Is Popeyes Selling "Good" Junk Food?
Arlisa Campbell Lucas Dille Deborah Combs	David's Bridal Bankruptcy, Take Two
Jose Cerecedo Lopez	LIV Golf: Birdie or Bogey?
Mary Dunn	Harry Lao at Orthoview Imaging, Inc.
Dalten Fox	An Unlikely Alliance in the Owyhee Canyonlands
Jonathan Ross Gilbert	The Smith Companies: Reimagining Sales
Viktor Golovii	Shabo Winery: From "Industrialist" to "Terroir-ist"
Sarah Holtzen Christine Manno Megan Douglas	Target's Pride Dilemma
Umer Hussain Han Ma	A Women's Soccer League in Gilgit Baltistan
Parvathi Jayaprakash Jikku Susan Kurian	Millet Amma: Reviving a Good Grain
Saqib Khan DHIM Haque	Zagime First Nations Senior Care Residence

Case Author(s)	Start-up Case Title
Sarah Lee Jacob A. Massoud	Vino Mundo: Bringing Wines of the World to Costa Rica
Chiajung (Jasmin) Lin Shane Su Daisy C. Wang	No Place for Bigots
Emi Makino	Is it Crazy to Launch a New Restaurant During a Pandemic?
Christine Manno	Walton Arts Center: What a PRIDE Week Drag!
Maryam Mohiuddin Ahmed Sergio Nava-Lara	Just Like Family
Ashley Monaco	Issue the Audit Opinion? Collect the Fee?
Kyleen Myrah Dean Warner	Is Hard Apple Cider Good for Unusually Good Food Company?
Douglas Nay Daisy C. Wang Douglas Friedman	Peloton's Deathly PR Crisis
Vicky Nie Nick Chen William Wei	Linked Digital Services: Indigenous Business Growth
Olesia Nikulina	Promoting Global Blue to Sporadic Travelers
Mehrnoosh Reshadi	An Influential Starbucks Barista
Leonard J. Samborowski Christine Beaudin	Red Line Franchise: Do Well by Doing Good
Gaunette Sinclair-Maragh et al.	Positioning St Thomas Jamaica for Heritage Tourism
Sara Smit Adrian Pitariu Colleen Sharen	Inheriting a Demoralized IT Team
Nino Tandilashvili Marina Tabatadze Anna Tandilashvili	From invention to the global marketplace. Strategy of an entrepreneurial start-up
Juan Velez-Ocampo	Is New Stetic's New Customer a Good Deal?
Daisy C. Wang Douglas Nay Chiajung (Jasmin) Lin	Wang, Nay, Lin. Song after Song: Doing Business at a Nightclub
Faith Yegul Stephen Thomson Nathan Woodard	Perfecting Purity Life's Perfect Order Rate
Anna Czegledi Jane Gravill	Higher Education Sector Competing in a Changing World: Will the Risk be Worth the Reward for Unity College? A Systems Thinking Approach

Pedagogy Track: Developing Case Scholarship in Teaching and Research

Track Chairs: Ajoy K. Dey, Birla Institute of Management Technology,
and Mike Annett, MacEwan University

Co-Chairs: Anjan Ghosh, Nazarbayev University Graduate School of Business,
and Shreya Mishra, Birla Institute of Management Technology

Session Chair: Ajoy K. Dey

Full Papers

Authors

The Curious Case of Crafting Management Cases

Nidheesh Joseph

Using Teaching Cases as a Framework for Peer-Learning in
the Canadian Social Finance Ecosystem

Sergio Alberto Nava-Lara
Sean Geobey

Proposals/Presentations

Adopting The Case Method in The Arab Mena: Is Contextual
Relevance as Important as Conceptual Relevance?

Randa Salamoun

Case Pedagogy Literature Review

Mike Annett

Teaching Finance with Cases in the Digital World: Valuing
Innovation

Francisco J. López Lubián

Split Testing Case Formats

Mike Annett

Constructive Review of Theory of Planned Behaviour

Mike Annett

THE CURIOUS CASE OF CRAFTING MANAGEMENT CASES

Nidheesh Joseph, Indian Institute of Management, Tiruchirappalli

Research Objectives

This is a short essay detailing my five-year experiences of researching, writing, and publishing teaching case studies using primary data. In this essay, I provide five insights and five recommendations for case researchers, case writers. The essay will also be helpful for management school administrators, Deans and Department Heads.

Theoretical and Practical Contributions

Practical contributions towards new and young case researchers, case writers both faculty and otherwise, also for management school administrators, Deans and Department heads.

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 2023 Conference, San Antonio, Texas, USA, October 5-7, 2023. © 2023 by Nidheesh Joseph. Contact person: Nidheesh Joseph, IIM Tiruchirappalli, Pudukkottai Road, Chinna Suriyoor village, Tiruchirappalli, Tamil Nadu, India, nidheesh.f16001@iimtrichy.ac.in.

USING TEACHING CASES AS A FRAMEWORK FOR PEER-LEARNING IN THE CANADIAN SOCIAL FINANCE ECOSYSTEM

Sergio Nava-Lara, University of Waterloo (student author)
Sean Geobey, University of Waterloo (faculty supervisor)

Research Objectives

Exploring the role of teaching cases in initiating and facilitating peer-learning interactions within the context of the Canadian social finance ecosystem, specifically among Investment Readiness Program (IRP) participants. It aims to understand how teaching cases can serve as a catalyst for promoting collaborative learning and knowledge exchange among participants in the social finance domain. It is anticipated that the IRP will implement learning circles in which this research will be applied; however, the dynamics of these circles are not yet defined, so the research methodology will depend on the dynamics, whether face-to-face or remote, or whether they are synchronous or asynchronous.

Theoretical and Practical Contributions

The anticipated research results involve uncovering the perceptions of social purpose organizations (SPOs) in Canada regarding teaching cases as a catalyst for peer-learning. It aims to explore the effectiveness of teaching cases in initiating and promoting a peer-learning framework within the SPOs. Additionally, it aims to examine the impact of teaching cases on capacity building within these organizations. The study will also focus on the context of teaching case implementation, providing insights into the challenges and effectiveness of using teaching cases in specific settings. The research findings are expected to have practical implications for SPOs in Canada by providing guidance on incorporating teaching cases into peer-learning initiatives and strategies. The study will contribute to the development of educational approaches within the social finance ecosystem, supporting the integration of teaching case methods into training programs and professional development initiatives. It also fills a research gap by examining the effectiveness and impact of teaching cases in fostering collaboration and capacity building within SPOs in Canada. Lastly, the study provides insights into effective strategies for facilitating peer-learning in specific settings, offering valuable lessons for organizations operating in diversified contexts.

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 2023 Conference, San Antonio, Texas, USA, October 5-7, 2023. © 2023 by Sergio Nava-Lara & Sean Geobey. Contact person: Sergio Nava-Lara, University of Waterloo, Waterloo Institute for Social Innovation and Resilience (WISIR), sergio.nava-lara@uwaterloo.ca.

Accounting, Finance, and Economics Cases

Track Chair: Michele M. McGowan, Kings College

Co-Chair: Tanveer Shehzad, Lahore University of Management Sciences

Session Chair: Michele M. McGowan

Cases	Authors
Crypto and the Condo: Purchasing Real Estate Through the Second United States NFT Auction	Charles M. Hilterbrand, Jr. Sergio Gárate
Developing a Process for Due Diligence: Evaluating Fund and ETF Performance under Reg B-I and Fiduciary Duty	Jan Serrano
The Mortgage Refinancing Dilemma: A Tale of Two Proposals	Michele M. McGowan
Page Industries Limited: Valuation of Growth!	Amiya Kumar Sahu
How Far Can Buybacks Go? A Case of Bank Alfalah	Sana Tauseef Madeeha Omar

CRYPTO AND THE CONDO: PURCHASING REAL ESTATE THROUGH THE SECOND UNITED STATES NFT AUCTION

Charles M. Hilterbrand, Jr., University of Mississippi
Sergio Gárate, Emory University

Case Objectives and Use

This case is designed for an undergraduate real estate law class. The real estate law class has a heavy focus on real estate transactions and title examination. This is the focus of this IM. This case can also be used for real estate classes at the graduate level, real estate law classes within a law school environment, and it can be used for practical instruction in a real estate law or title insurance office. As cryptocurrency and NFT transactions are the novelty in this case, the process of using an NFT vehicle and using blockchain technology to transfer real estate may have a broader appeal to finance classes, and computer science/MIS related classes.

Case Synopsis

A wife and husband real estate investment team found the perfect corporate rental property unit for sale in Tampa, Florida. The team with over two decades of property experience was convinced that he had seen just about everything with real estate transactions, they were wrong. The property under consideration was about to be the second real estate transaction in the United States sold as a non-fungible token (“NFT”) and the currency that was used was a cryptocurrency. The couple, who had a basic understanding of how cryptocurrencies worked, knew that he would have to learn about a new way of exchanging funds for real estate. There was a call for a crash course in NFT transactions and how those NFTs were used to acquire property. They were confident in their ability to perform real estate title due diligence, but using smart wallets with cryptocurrencies and smart contracts to buy an NFT that holds real estate was different.

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 2023 Conference, San Antonio, Texas, USA, October 5-7, 2023. © 2023 by Charles M. Hilterbrand, Jr. and Sergio Gárate. Contact person: Charles M. Hilterbrand, Jr., University of Mississippi, 242 Holman Hall, University, MS 38677, (330)685-6380, chilterbrand@bus.olemiss.edu .

DEVELOPING A PROCESS FOR DUE DILIGENCE: EVALUATING FUND AND ETF PERFORMANCE UNDER REG B-I AND FIDUCIARY DUTY

Jan Serrano, Francis Marion University

Case Objectives and Use

The main objective of this case is to teach students how to evaluate the merits of various mutual funds given historical return and risk measures and to compare that to a less expensive ETF alternative. While asset allocation is still the most important factor in helping clients reach their goals, investment advisors must not only have a good understanding of what common performance and risk statistics mean, but they must determine which of the variables is the most important and construct a process for evaluating a group of mutual fund and ETF investments based on the risk and return data available to them as well as costs. This case is best used in an advanced investments course covering portfolio management issues. The case has a difficulty level appropriate for junior or senior level undergraduate investments courses or graduate investments courses. This case should be used after students have covered the topic of mutual funds and the return and risk measures used to evaluate portfolio or fund performance. Before attempting this case, students should have a thorough understanding of the portfolio performance and risk measures given in the case tables, particularly cumulative return, annualized standard deviation, beta, alpha, r^2 , sharpe, and treynor, statistic.

Case Synopsis

Brent Butler, a Littleton University alumnus was back on campus in March of 2023 talking with students about his career and his recent transition to financial advisor at a small, independent investment group. After transitioning clients to his new firm and weathering the market downturn of 2022, he had been spending time reevaluating the expanded mutual fund and ETF options available to his clients at the new firm. Dr. Smith, a finance professor at Littleton and acquaintance of Brent's had asked him to help with an assignment requiring students to evaluate the performance of a set of mutual funds in a real-world setting – the ones he had available at his new firm. Tanner Craig, the high-ranking finance student at Littleton was anxious to do his ace this assignment. This could be an important project that he could discuss with potential employers that might get his foot in the door. The regulations on what all investment professionals are required to do in making recommendations to clients have changed. Investment professionals seeking or holding the Certified Financial Planner® designation must now acknowledge that they have a fiduciary duty to all clients. The Securities and Exchange Commission's Regulation Best Interest rule which went into effect in June of 2020 imposes many of the duties of a fiduciary on financial advice providers. Investment professionals must be able to document the process they use for making their recommendations, particularly if selecting mutual funds over cheaper alternatives like ETFs.

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 2023 Conference, San Antonio, Texas, USA, October 5-7, 2023. © 2023 by Jan Serrano. Contact person: Jan Serrano, Francis Marion University, 4822 E. Palmetto St., Florence, S.C. 29506 , PO Box 100547, Florence, S.C. 29502, 843-661-1620, jserrano@fmarion.edu .

THE MORTGAGE REFINANCING DILEMMA: A TALE OF TWO PROPOSALS

Michele M. McGowan, King's College

Case Objectives and Use

The case is an application of the decision-making process in mortgage refinancing. When a borrower refinances a mortgage, choices must be made in selecting the best refinancing option by considering interactive factors that contribute to the decision. When evaluating that decision, it is important to perform a proper analysis. Students will learn the basics of refinancing, gain an understanding of why a homeowner would want to refinance their mortgage, and recognize what factors should be considered in a mortgage refinancing decision. Students will examine the decision by considering the present values of cash flows and the break-even point, identifying the relevant factors for decision-making, applying Excel to analyze financial problems, understanding the importance of the customer experience in the decision-making process, and developing a recommendation based on financial and nonfinancial factors.

This case has been used in a face-to-face undergraduate financial management course. The case is generally used to enhance the material on amortization. Students should have already covered material on amortization, time value of money, and cumulative cashflows. The case is also highly relevant for real estate and personal finance courses to introduce the concept of refinancing at a basic level.

Case Synopsis

Aggie and Leo Holland are considering refinancing their home. They were presented with two proposals to consider. The Hollands, however, have not had a positive experience with their mortgage broker in the past and have reservations about refinancing with them again. They also experienced inertia associated with the paperwork. The case provides all data needed to analyze the proposals. Students are expected to compute the new mortgage payment amount, prepare amortization tables, calculate the present values of cash flows, and approximate the break-even point. This case is unique because it approaches the refinancing dilemma with simple, reasonable, and realistic assumptions and provides students with a necessary life skill. The case has been successfully used in face-to-face and online graduate and undergraduate financial management courses. The case is set in December 2021, as the holiday season approaches, which may also influence the Hollands' willingness to take on the refinancing process.

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 2023 Conference, San Antonio, Texas, USA, October 5-7, 2023. © 2023 by Michele M. McGowan. Contact person: Michele M. McGowan, King's College, 133 N. River St, Wilkes-Barre, PA 18711, 570-208-5900 x 5707, michelemcgowan@kings.edu.

PAGE INDUSTRIES LIMITED: VALUATION OF GROWTH!

Amiya Kumar Sahu, Goa Institute of Management, India

Case Objectives and Use

The case has a difficulty level appropriate for the 2nd year MBA and MS in Finance. The case is intended to illustrate the application of comprehensive valuation methods in estimating the fair value of a listed firm. This case discusses the typical issues which need to be understood as a prelude to computing the value of a firm and gives a summary of data and information required to forecast the key financial numbers to draw the cash flows and other valuation indicators. This case is designed to practice the estimation of the value of a firm. It focuses on understanding the characteristics of a high-growth firm, and estimation of Pro Forma financial numbers that are used in valuation. The case also discusses ‘what-if analysis’ to draw a value range for investment decisions.

Case Synopsis

In September 2022, Sara was given the task to estimate the fair value of Page Industries Limited. Since she was a fresher, she sought guidance from Root, her senior colleague. They get into a dialogue expressing the do’s and don’ts of a valuation exercise. In the conversation, the key elements and the steps involved in estimating the value of a firm were highlighted which would motivate the learners on the complex concepts of valuation and their applications. Sara draws the required information on the economic prospects, industry growth, and the company’s plans for growth and profitability. She made a set of assumptions for estimating cash flows and other indicators to value the firm. This case addresses several key issues in estimating the fair value of a firm that makes it unique. The foremost is on ‘*high-growth firms*’ (HGFs). The learners will explore, understand and distinguish HGFs compared to their counterparts. A comparative analysis of key financial factors over a long period is used for this. The next issue is on modelling for future growth to estimate revenue, profits, cash flows, and computation of intrinsic value. Finally, the case addresses the challenges in the estimation of fair multiples to value a firm using the relative valuation method. Page Industries was a leader in the innerwear segment of the readymade garments sector in India. It reported a revenue of INR 39.07 billion in FY2022. The revenue growth at a compounded rate was more than 17 per cent over the preceding ten years. It also reported high profitability. The average operating profit margin was 19.85 percent which was high as compared to its peers. On September 02, 2022, the market price of equity shares closed at INR 49,915.95 which translated to a price-to-equity multiple of more than 75 times. Sara was confused if the current market price was aligned with its fair value or if there was a ‘*value-price*’ deviation.

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HOW FAR CAN BUYBACKS GO? A CASE OF BANK ALFALAH

Sana Tauseef, Institute of Business Administration
Madeeha Omar, Institute of Business Administration

Case Objectives and Use

The case is designed for the undergraduate or graduate students for the courses on corporate finance, investment banking or capital markets. The students doing the case must have taken the introductory finance course and must have the basic knowledge of financial instruments and capital markets. The case provides an opportunity to discuss the financial statements of a bank and perform the financial analysis.

Students are invited to evaluate the impact of buyback on stock price in terms of signaling effect. The case also allows for a discussion of situations where buybacks can add value, discussion of buyback types as well as the share buyback policy, regulations and process in context of Pakistan. Case can be discussed in 90-minute session and will require 2-3 hours of outside preparation by students.

Case Synopsis

The top management of the Bank Alfalah started planning for a buyback transaction in early 2021 with an aim to take advantage of the low price-multiples and to create value for the shareholders. With no prior history of buyback in Pakistan's banking sector and given the large size, Alfalah's buyback transaction took several months to complete. During December 2022, the share buyback transaction of Bank Alfalah was executed in the two-week duration. Upon completion of the transaction, the management team was faced with many uncertainties regarding the impact of this transaction on the company reputation, share price and capital base.

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 2023 Conference, Hyatt Regency Hotel, San Antonio, Texas, USA, October 5-7, 2023. © 2023 by Sana Tauseef and Madeeha Akhtar. Contact person: Sana Tauseef, Institute of Business Administration, University Road, Karachi, Pakistan, +92300 2896293, sasghar@iba.edu.pk.

Cases Written in Portuguese Language

Track Chair: Tania Casado, University of São Paulo

Co-Chair: Erica Berte, Metropolitan State University

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Cases

Authors

O Dilema de Maísa: Ser Assistente Virtual ou ser Médica?

Adriely A. Zegaib
Tania Casado

O Salto em “Queda Livre” das Lojas Americanas

Patrícia Prado
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O Buraco É Mais Embaixo: Uma Questão E Decisão E Responsabilidade Socioambiental

Renata Luiza Castilho Rossoni
Erica Berte
Andre Luis Rossoni
Manolita Correia Lima

O Jovem Engenheiro Pablo e a Roda Gigante da Economia: um Caso sobre os Ciclos Econômicos de Negócios.

Fernando Freire Vasconcelos
Afonso Carneiro Lima
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Tradeoffs da Sustentabilidade Corporativa: As Tensões do Tripé da Sustentabilidade

Patricia Taeko Kaetsu
Júlia Mitsue Vieira C. Kumasaka
Tania Casado

O DILEMA DE MAÍSA: SER MÉDICA OU ASSISTENTE VIRTUAL?

Adriely Zegaib, Universidade de São Paulo (Aluna Autora)
Tania Casado, Universidade de São Paulo (Co-autora, Supervisora do Corpo Docente)

Objetivos do Caso e Uso

Entre os objetivos instrucionais estão:

1. Conhecimentos a serem adquiridos: Relacionar aspectos reais e teóricos da Teoria do Caos nas Carreiras e a *Planned Happenstance Theory* (Teoria do Acaso Planejado); Compreender como o planejado e o não planejado se conectam e se complementam no desenvolvimento de uma carreira;
2. Habilidades a serem desenvolvidas: Desenvolver uma visão flexível em relação à carreira e ao seu planejamento; Desenvolver uma maior abertura para novas oportunidades; Desenvolver a capacidade de tomada de decisões de forma estratégica, pensamento adaptativo e resiliência, além de reconhecer a importância de habilidades de *networking*;
3. Atitudes a serem estimuladas: Abrir mão da ilusão de total controle sobre a carreira e estar aberto a novas possibilidades não planejadas e imprevisíveis ao longo da construção da carreira. Entender que o acaso não é apenas inerente ao processo de desenvolvimento de carreira, mas também um fator importante e desejável.

O caso pode ser utilizado em cursos de Ensino Médio e em Cursos de Graduação nas áreas de Administração e Psicologia, nas aulas de Carreiras Contemporâneas, Planejamento e Gestão de Carreiras.

Sinopse do Caso

O caso, baseado em fatos reais, conta a história de Maísa, uma jovem curiosa e espontânea de 24 anos, que enfrentou diversas mudanças ao longo de sua breve trajetória de Carreira: assim que concluiu o Ensino Médio deu início a uma graduação em Direito, após dois anos optou por interromper os estudos nesta área e embarcar em uma nova graduação em Serviços Sociais e, por último, tomou a decisão de cursar Medicina em uma instituição estrangeira.

O dilema do caso acontece quando Maísa, morando em Buenos Aires e estudando Medicina, entra em um clube virtual para mulheres viajantes e conhece Shakti que, por acaso, iria visitar Buenos Aires em algumas semanas. Logo, Maísa a convida para se hospedar em sua casa e, ao conversarem, Shakti diz que está procurando uma nova Assistente Virtual para ajudá-la em seu empreendimento e que Maísa poderia ocupar essa vaga, caso desejasse. Maísa, que anteriormente já havia cogitado ser Assistente Virtual, por conta da liberdade financeira e geográfica que poderia conquistar, fica deslumbrada com a oferta da mais nova amiga e então precisa decidir se continua em sua graduação em Medicina ou se, mais uma vez, altera a trajetória de sua carreira e começa a trabalhar como Assistente Virtual de Shakti.

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 2023 Conference, San Antonio, Texas, USA, October 5-7, 2023. © 2023 by Adriely Zegaib and Tania Casado. Contact person: Adriely Zegaib, Universidade de São Paulo, 908 Av. Professor Luciano Gualberto, Butantã, São Paulo, SP, Brasil, +55 (11) 98324-7506, adriely_auriema@usp.br.

O SALTO EM “QUEDA LIVRE” DAS LOJAS AMERICANAS

Patricia Figueiredo do Prado, FEA-USP (autor estudante)
Prof. Dra. Daielly Mantovani, FEA USP (supervisor do corpo docente)

Objetivos e uso do caso

O presente caso traz uma discussão atual do direcionamento da empresa Americanas em meio a uma crise financeira, em 2023, que ainda está em apuração dos volumes inicialmente estimados em 20 Bilhões de reais. Essa é uma das maiores crises financeiras no Brasil. O objetivo do caso é auxiliar o atual CEO Leonardo, empossado em meio à crise instalada, a definir sobre seu dilema, que é sobre quais deveriam ser as decisões estratégicas que não gerariam novas crises internas e externas à empresa ao propor a reorganização para uma nova trajetória de crescimento.

Sinopse do Caso

Ao longo de décadas, as empresas varejistas têm atravessado um intenso ritmo de transformação. Foram vivenciados, em âmbito global e local, grandes movimentos de crises que geraram consequentes evoluções, reorganizando o mercado do consumo, principalmente. Tiveram destaque as empresas que, por terem uma gestão baseada em resultados e com grande foco no longo prazo, se fortaleceram durante os períodos de crises. A Lojas Americanas é um desses casos. Nas últimas décadas (2001-2022), a empresa Americanas (ou Lojas Americanas) buscou formas de inovar e manter-se competitiva no mercado brasileiro. Ela se tornou uma das cinco principais redes varejistas do Brasil, contando com mais de 1.700 estabelecimentos até o início de 2023. Em janeiro de 2023, uma suspeita de fraude contábil na empresa abalou a confiança do mercado e de seus *stakeholders*. Após a recusa do CEO Rial, que assumiu nove dias antes do anúncio da fraude e se demitiu diante o escândalo, Leonardo, o novo CEO, aceitou o desafio de liderar a Americanas e enfrentar a crise instalada com a notícia e situação de recuperação judicial que a empresa se encontrava. Leonardo Coelho Pereira tinha como missão ser o protagonista da reorganização empresarial e desenrolar os processos investigativos que se culminaram pelo pedido aceito de recuperação judicial.

Leonardo, apesar de ser um profissional experiente no setor varejista e visto pelo mercado como um executivo capacitado em gestão de crises e reestruturação de empresas, já sofria grande pressão dos *stakeholders e shareholders* para determinar um novo ritmo à gestão da empresa. Ciente dos muitos desafios que a empresa enfrentava naquele momento, o dilema do atual CEO Leonardo era: quais deveriam ser as decisões estratégicas que não gerariam novas crises internas e externas à empresa ao propor a reorganização para uma nova trajetória de crescimento? Na visão de Leonardo, as iniciativas estratégicas que fossem definidas precisavam ser rapidamente absorvidas na empresa. Ademais, elas não deveriam gerar conflitos desnecessários na cultura de “resultado a todo custo” que estava permeada na empresa.

Os autores desenvolveram o caso para discussão em sala de aula, e não para ilustrar a maneira eficaz ou ineficaz de lidar com a situação. O caso e a nota de ensino foram anonimamente revisados por pares para apresentação na Conferência NACRA 2023, San Antonio, Texas, EUA, de 5 a 7 de outubro de 2023. © 2023 por Patricia Figueiredo do Prado e Dailly Mantovani. Pessoa de contato: Patricia Prado, FEA USP. Faculdade de Economia, Administração, Contabilidade e Atuária da Universidade de São Paulo Avenida Professor Luciano Gualberto, 908 - Butantã - São Paulo/SP - 05508-010, +551130916001, patriciafprado@usp.br.

O BURACO É MAIS EMBAIXO: UMA QUESTÃO E DECISÃO E RESPONSABILIDADE SOCIOAMBIENTAL

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Objetivos e uso do caso

Este caso de ensino é voltado principalmente para estudantes de cursos de graduação e pós-graduação focados em Gestão Estratégica, Reparação Ambiental e Responsabilidade Social Corporativa (RSC). O caso se concentra em desafios enfrentados pela Sr^a. Ferreira presidente da empresa de consultoria R&C Ambiental, enquanto lida com um desastre ambiental que ocorreu em Maceió em 2018, envolvendo a empresa Braskem. O objetivo do caso é aprimorar a compreensão dos estudantes sobre a gestão ambiental e a responsabilidade social corporativa dentro do contexto de tomada de decisões estratégicas as questões abordadas no caso são relacionadas à gestão de crises ambientais, reparação de danos ambientais, reconstrução da imagem corporativa e o papel da RSC em situações de crise. Habilidades como trabalho em equipe, tomada de decisões estratégicas, comunicação eficaz e visão de longo serão aprimoradas através da análise e discussão do caso.

Sinopse do Caso

O caso se passa no cenário de um desastre ambiental que ocorreu no início de 2018 em Maceió, envolvendo a empresa petroquímica Braskem. A protagonista deste caso é a Sr^a. Ferreira, presidente da consultoria R&C Ambiental, que tem a tarefa de conduzir a gestão das repercussões deste desastre.

Sob a liderança da Sr^a. Ferreira, a R&C Ambiental é incumbida de auxiliar a Braskem na mitigação dos danos ambientais ocorridos e na restauração de sua imagem corporativa, danificada com imputação do desastre ambiental. Este desafio é intensificado pela natureza da indústria em que a Braskem opera, a indústria petroquímica, conhecida por seus desafios significativos em relação à sustentabilidade e aos impactos ambientais.

A Sr^a. Ferreira, frente à R&C Ambiental e sua equipe, enfrentam um dilema complexo e multifacetado. Precisam identificar e implementar estratégias eficazes para reparar os danos ambientais e, ao mesmo tempo, trabalhar para reconstruir a reputação da Braskem. Este processo deve considerar os impactos diretos do desastre sobre o meio ambiente e as consequências indiretas para as comunidades e stakeholders envolvidos. Ao longo deste percurso, a Sr^a. Ferreira deve assegurar que a consultoria se mantenha fiel aos princípios da Responsabilidade Social Corporativa (RSC) e da reparação ambiental, cabendo a ela o papel de representar a R&C Ambiental na apresentação da proposta escolhida para a empresa contratante.

Os autores desenvolveram o caso para discussão em classe em vez de ilustrar o manejo efetivo ou ineficaz da situação. O caso e a nota de ensino foram revisados anonimamente por pares para apresentação na Conferência NACRA 2023, San Antonio, Texas, EUA, de 5 a 7 de outubro de 2023. © 2023 por Renata Rossoni e coautores. Pessoa de contato: Renata Rossoni, Escola Superior de Propaganda e Marketing, Rua Dr^o. Alvaro Alvim, 123, São Paulo – SP-BR, fone 55 66 996450936, e-mail: renatalcrossoni@gmail.com.

O JOVEM ENGENHEIRO PABLO E A RODA GIGANTE DA ECONOMIA: UM CASO SOBRE OS CICLOS ECONÔMICOS DE NEGÓCIOS

Fernando Vasconcelos, Universidade de São Paulo (student author)

Luiz Antunes, Universidade de São Paulo (student author)

Afonso Lima, Universidade de Fortaleza (faculty supervisor)

Case Objectives and Use

Este caso aborda aspectos utilizados em disciplinas como Economia Empresarial, Gestão Contábil Financeira, Gestão Estratégica, Negociação e Conflitos, Gestão Integrada de Custos e Orçamento, Finanças Corporativa, Marketing, Planejamento, Gestão de Risco e Logística. Cuida-se de um caso real que justifica sua utilização devido a discussão gerada de como agir em tempos de expansão e depressão econômica, antecipação de cenários macroeconômicos e que estratégias para enfrentamento desses ciclos.

Case Synopsis

Pablo é um profissional de engenharia formado há poucos anos que resolveu empreender no setor da construção civil por volta do ano de 2014 no Brasil. O sonho de Pablo era ofertar casas populares de atendendo aos critérios de qualidade e de baixo custo para moradores da zona metropolitana da cidade de Fortaleza, em razão do potencial comercial da região, do déficit de moradias, do baixo valor dos terrenos no local e dos benefícios governamentais direcionados ao público de baixa renda para aquisição da tão sonhada casa própria. Em função do mercado aquecido, Paulo resolve reunir esforços para sua empreitada, contudo em função do seu otimismo, não foram visualizadas certas situações típicas de mercados muito aquecidos. Superado o desafio inicial, o jovem engenheiro começa planejar uma nova obra, mas o cenário está mudando rapidamente para uma contração econômica e isso pode afetar decisivamente a empresa recém-criada.

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TRADE-OFFS DA SUSTENTABILIDADE CORPORATIVA: AS TENSÕES DO TRIPÉ DA SUSTENTABILIDADE

Patricia Taeko Kaetsu (student author), Universidade de São Paulo
Julia Mitsue Kumasaka (student author), Universidade de São Paulo
Tania Casado (faculty supervisor), Universidade de São Paulo

Objetivos e Uso do Caso

O caso discute o tripé da sustentabilidade (ou triple bottom line, TBL) e as tensões existentes entre as dimensões sociais, econômicas e ambientais. Ainda que o conceito seja conhecido e adotado por diversas organizações, na prática, o TBL apresenta diversas limitações em abarcar a sustentabilidade. O caso traz os aspectos sociais, econômicas e ambientais de uma decisão estratégica de fornecimento de matérias-primas. O objetivo, portanto, é discutir as tensões entre as dimensões do tripé, promover o pensamento crítico para a tomada de decisões e a resolução de problemas de sustentabilidade. O público são estudantes de graduação e especialização de disciplinas que permeiem questões de sustentabilidade e gestão responsável, como operações, marketing, gestão estratégica, empreendedorismo, agronegócios.

Sinopse do Caso

O caso conta a história de Carlota Oliveira, uma empreendedora do norte do Brasil, que queria apresentar os sabores amazônicos para o mundo. Um misto de desconforto com o desconhecimento das pessoas sobre a sua cultura e de motivação em mostrar o quão interessantes eram os produtos típicos, a levaram a empreender. Depois de uma tentativa de empreender frustrada, Carlota encontrou um nicho de produtos especiais e fundou a indústria alimentícia AmazFood. O caso foca na indústria e nos seus princípios de trabalhar com ingredientes da floresta em pé e adotar o comércio justo e responsável nas relações com fornecedores e suas comunidades.

Para atender mais clientes e expandir suas atividades, a Amazfood precisava de mais fornecedores. A região amazônica é composta por muitos produtores com acesso restrito a infraestrutura de transporte e comunicação, a oportunidades de profissionalização ou com pouco conhecimento sobre a importância da conservação da natureza local. Assim, em 2023 Carlota se viu diante de uma difícil decisão: buscar o relacionamento direto com os fornecedores locais e auxiliar no seu desenvolvimento ou terceirizar isso por meio de atores locais de intermediação. As duas escolhas apresentavam diferentes trade-offs entre as dimensões do tripé da sustentabilidade e diversas consequências para a empresa e para as comunidades da região.

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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^a Sayeras, ESADE Business School, (Ramon Llull University)

Session Chair: Josep Lluís Cano Giner

Cases	Authors
Grupo Pikolinos: “El Humano Aumentado en la Producción de Calzado”	Josep Lluís Cano Giner
Makaia: El Retorno de la Cofundadora	Ernesto Barrera Carolina Torres
Team Color Inc California	Jorge A. González Verónica Delgado

GRUPO PIKOLINOS: “EL HUMANO AUMENTADO EN LA PRODUCCIÓN DE CALZADO”

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 automatización de la secuenciación de las tareas de producción manuales.
- Inferir el impacto que puede tener la adopción de software en los procesos y en las personas.

Específicos:

- Categorizar los criterios de secuenciación y las restricciones de las subtareas de cosido.
- Establecer y comparar los distintos criterios para comparar las alternativas de solución.

El caso Grupo Pikolinos: “El humano aumentado en la producción de calzado” ha sido diseñado para ser utilizado en cursos de operaciones, innovación o transformación digital. La COVID-19 lamentablemente se ha convertido en el principal acelerador de la digitalización de las organizaciones. El caso plantea la necesidad de mejorar el *lead time* de producción del calzado para mejorar el servicio al cliente.

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

Rosana Perán, vicepresidenta del Grupo Pikolinos, tenía una reunión con Julián Martínez, director de PikoKaizen, y Ángel Gómez, miembro del equipo de mejora continua del grupo, a finales del mes de enero de 2021. Debían decidir sobre cómo reducir el lead time de producción. Se planteaba la posibilidad de desarrollar un software que secuenciara las subtareas de cosido de las aparadoras (reciben este nombre las trabajadoras que cosen las distintas piezas de piel y el forro para conformar un calzado). Esta asignación tradicionalmente la hacían las supervisoras de la sección de aparato. Llevar a cabo el proyecto supondría adoptar un robot que realizara el reparto de las banastas (cajas que contienen los materiales preparados para cada subtask) a las aparadoras. La decisión se tenía que tomar rápidamente: solo dispondrían de tres meses para seleccionar los proveedores que los acompañarían en el proyecto, y estos dispondrían de apenas tres meses para diseñar y preparar todo lo necesario.

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 was anonymously peer reviewed for presentation at the NACRA 2023 Conference, San Antonio, Texas, U.S., © by Josep Lluís Cano Giner. Contact person: Josep Lluís Cano, ESADE Business School (Ramon Llull University), Av. Pedralbes 60-62, 08034 Barcelona, Spain, +34-93-280-6162, josepluis.cano@esade.edu

MAKAIA: EL RETORNO DE LA COFUNDADORA

Ernesto Barrera Duque, INALDE Business School, Colombia
 Carolina Torres Castillo, INALDE Business School, Colombia

Case Objectives and Use

This case has the main objectives of identifying challenges and issues related to executive succession, particularly concerning to governance structure, organizational dynamics, and leadership styles of both the outgoing and incoming individuals. Additionally, it aims to provide an understanding of the levers and tools necessary to carry out an executive succession process at both the organizational governance level and implementation level, considering the structure of responsibilities and culture. As a result, students will develop practical skills to effectively participate in these types of processes that are part of organizational life.

It was designed to be taught in executive education programs focused on preparing executive succession in organizations of different types. It can be taught in the MBA program as part of the General Management course, specifically addressing executive succession, and in Executive Education programs to gain insights into methods for preparing succession in an organization.

Case Synopsis

In June 2006, Catalina Escobar, along with her co-founders Maria Claudia Camacho and Camilo Mondragón, established the Makaia Corporation, a nonprofit organization (NGO). The purpose was to enhance capacities for social development through cooperation, alliances, and the use of technology for social change. Makaia carried out its activities through methodologies that allowed individuals and organizations to adopt technological tools in their work and productive activities. Catalina served as the executive director and was responsible for the organization's operations, while the two co-founders, who were married, remained abroad but actively participated in the board of directors and the founding council.

During the first 10 years, significant changes took place within the organization's structure. In 2015, a strategic renewal was implemented that had an impact on the governance structure (board of directors). At the same time, Catalina openly expressed her desire to step down from the Executive Director position to focus on strategic projects for the organization's growth. Finally, it was decided that Catalina would continue to support the organization as Strategy Director.

Carlos González was chosen as Catalina's successor in 2017. He seemed to have the managerial style that Makaia needed in its new strategic stage of consolidation with accelerated and self-sustainable growth. However, he faced complex challenges when he assumed the role of Executive Director, especially with the second-line executives who used to report to Catalina Escobar.

Catalina was concerned because it was inevitable to perceive a tense atmosphere among the team of executives and collaborators. It was unavoidable to consider the wear and tear and the consequences that this process could be bringing.

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 2023 Conference, San Antonio, Texas, USA, October 5-7, 2023. © 2023 by Ernesto Barrera Duque and Carolina Torres Castillo. Contact person: Ernesto Barrera Duque, INALDE Business School, Autopista Nte. #Km 7, Costado Occidental, Puente Del Común, Chía, Cundinamarca, +571 8614444, Ernesto.barrera@inalde.edu.co.

TEAM COLOR INC. CALIFORNIA

Jorge Alfonso González González, Tecnológico de Monterrey
Verónica Delgado Cortés, Tecnológico de Monterrey

Case Objectives and Use

El caso está desarrollado para discutir las dificultades de la gerencia estratégica que busca emplear el modelo ESG (Environment, Social and Governance), especialmente tratándose de empresas pequeñas y medianas. Está escrito para cursos de la parte final del pregrado o inicial de un posgrado (MBA curso de estrategia de negocios). Se abordan aspectos relacionados con trabajo fronterizo y migración, oportunidades de crecimiento y su evaluación financiera medioambiental y social. Está previsto que los estudiantes desarrollen competencias de toma de decisiones estratégicas considerando valores éticos en los negocios.

Case Synopsis

El caso presenta la decisión que debe tomar Julio Delgado, director y propietario de la empresa “Color Inc California” dedicada a la impresión en tinta en prendas de vestir (camisetas, ropa deportiva, nombre de la marca etc.) en San Diego California (USA). La situación se presenta en el inicio del año 2023 ya que debe responder la solicitud de un cliente para el mes de noviembre del mismo año. El cliente ocuparía el 60% de la capacidad instalada de la planta. Ofrece una compra con un buen margen de utilidad sobre venta, pero está interesado sólo si los productos garantizan materias primas y procesos sostenibles con el medio ambiente y que la empresa ofrezca un trato justo a sus empleados. Julio sabe que de aceptar el pedido, implicaría una completa transformación de la empresa ya que actualmente no hay programa medioambiental y emplea trabajadores que incluso no cuentan con el permiso de trabajo en la Unión Americana.

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 2023 Conference, San Antonio, Texas, USA, October 5-7, 2023. © 2023 by Jorge Alfonso González González and Verónica Delgado Cortés. Contact person: Jorge A. González, jgonza@tec.mx, Tecnológico de Monterrey, Campus Guadalajara, México.

Corporate Governance and Ethics Cases

Track Chair: Vijaya Zinnoury, University of Denver

Co-Chair: Theresa Coates, Limestone College

Session Chair: Vijaya (Vi) Zinnoury

Cases

Just Do It: Challenge Sneaky Conflicts

Debating The Merits of Deregulation in The Movie Industry: Do Small Businesses Need Protection?

Authors

Carolyn Conn
Sherron Watkins

Jody Tompson
Arlene Nykaza
Deirdre Dixon

JUST DO IT: CHALLENGE SNEAKY CONFLICTS

Carolyn Conn, Texas State University
Sherron Watkins, Self-employed Consultant

Case Objectives and Use

This case is suitable for graduate or upper-level undergraduate courses in business ethics and any course in which the topic of conflicts of interest is covered. The primary learning objectives of this case are to provide students with materials so they can:

- Evaluate a situation in which there may be actual or perceived conflicts of interest, with an emphasis on the perspectives of multiple stakeholders
- Utilize ethical analysis to evaluate a situation that has potential negative consequences for the professional career and revenue generation of multiple stakeholders
- Analyze a corporate code of conduct for guidance in decision making.
- Identify alternate courses of action using multiple ethical frameworks

Case Synopsis

The focus of this case is the conflict of interest (either actual or perceived) that resulted from Joe Hebert, at age 19, generating sizable profits starting in 2018 from reselling sneakers, many of which were Nikes. His entrepreneurial spirit and hard work could be applauded for generating self-reported sales as high as \$600,000 and consistently hitting \$200,000 in most months from his business West Coast Streetwear. However, his mother, Ann Hebert, was vice president and general manager of Nike North America. During an interview with a Bloomberg reporter, Joe sounded boastful: “If you know the right people here [Portland], this is the city to sell shoes.” He added that the right people “can give you access to stuff that, like, a normal person would not have access to.”

When Joe first began reselling sneakers in 2018, Ann disclosed that information to Nike and they said there was no violation of company policy or conflicts of interest. They reiterated that position again in 2021 after Joe was featured in a Bloomberg article. Yet, on March 1, 2021, Ann Hebert resigned from Nike, where she had spent 25+ years steadily progressing from her first job as a sales rep to VP and GM of North America. Should Ann, Joe, and Nike have anticipated the ultimate outcome of Joe’s sneaker reselling business? Did Ann violate the corporate Code of Conduct? Was a code of conduct even necessary to guide decision making in this situation? How might different decisions have yielded different results? Even though the actual outcome is known, this case provides multiple lessons in the concepts of actual and perceived conflicts of interest and ethical decision making.

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 2023 Conference, San Antonio, Texas, USA, October 5-7, 2023. © 2023 by Carolyn Conn and Sherron Watkins. Contact person: Carolyn Conn, Texas State University, 601 University Drive, San Marcos, TX 78666, (512) 245-2566, cc31@txstate.edu

DEBATING THE MERITS OF DEREGULATING THE MOVIE INDUSTRY: DO SMALL BUSINESSES NEED PROTECTION?

George H. (Jody) Tompson, University of Tampa
Arlene Nykaza, University of Tampa
Deirdre Dixon, University of Tampa

Case Objectives and Use

The case is designed for courses in business law or entrepreneurship courses that address legal aspects of small business. It is suitable for both undergraduate and Master's courses. The focus of the case is the impact of deregulation on small businesses, specifically the small and independent movie theaters competing with the chains of national multiplex cinemas. The US Department of Justice is planning to remove the restrictions that govern how movie studios distribute their films. How will this decision impact the industry? The case is designed primarily to stimulate debate for students to consider the merits of deregulating an industry that is already dominated by large multinational companies. Furthermore, small theaters must make decisions on how they will successfully compete once the film studios are no longer regulated.

Case Synopsis

This case provides a brief background about the Tampa Theatre but the main focus is deregulation of the movie industry. Set in early 2021, the case describes a non-profit organization enjoying unprecedented growth in its 95-year history, but one that was also facing an unusual threat. Without much warning, in late 2019 the US Department of Justice announced plans to deregulate the movie industry by overturning the Paramount Consent Decrees of 1948. John Bell, CEO of the Tampa Theatre, believes the major film studios like Disney and Paramount Pictures will become even more powerful after deregulation, and he wonders how small companies like his should respond.

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 2023 Conference, San Antonio, Texas, USA, October 5-7, 2023. © 2023 by Tompson, Nykaza, and Dixon. Contact person: Jody Tompson, University of Tampa, Sykes College of Business, 401 W. Kennedy Blvd., Tampa, FL 33606. jtompson@ut.edu 813-257-3284.

Digital Technologies and Operations Cases

Track Chair: Clinton Daniel, University of South Florida

Session Chair: Clinton Daniel

Cases

Bagallery: In Search for the Operating Model for Growth

Managing Production at Sienci Labs: Push or Pull?

Digital Armor: A Cyber Insurance Catastrophe Response Plan

Middleware Mes: Connecting the Factory Floor to the ERP

Physician Advisory Program at Rochester Regional Health: An Exercise in Participatory Sociotechnical Design

Sonos Inc.: Product Development at the Speed of Sound

Authors

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BAGALLERY: IN SEARCH OF THE OPERATING MODEL FOR GROWTH

Farah Naz, Institute of Business Administration
 Mohsin Zamir (student author)
 Tooba Siddiqui (student author)

Case Objectives and Use

This case is intended for elective courses such as Distribution and Logistics and Supply Chain for undergraduate and graduate-level students. This could also be taught in the distribution module of Brand Management, Marketing Management, and Entrepreneurial Marketing courses. This case is for final-year undergraduate or MBA students and can be taught in a 90-minute class. The case illustrates how start-ups evolve with their business and operating models. Students often come to class with little or no background in distribution models for e-commerce businesses and are mostly unaware of how these models influence a company's growth and profitability. With the help of this case, the students will be able to:

- To show how the business model of start-ups evolves
- To apply the concepts of the business model canvas, lean start-ups, and chasm strategies.
- To highlight the importance of operating models in the success of the firms.

Case Synopsis

In January 2021, Mina Salman, co-founder of Bagallery, a fashion, beauty, and lifestyle e-commerce platform, had to decide which operating model would work best for the company. Business conditions in Pakistan due to Covid-19 were challenging, and the future due to Covid looked uncertain. To date, Bagallery's e-commerce platform worked on a pre-order delivery model. This model relied upon imports of international brands. Covid-19-related restrictions and the resulting supply chain issues, increased lead time, customer order fulfillment delays, and customer cancellations forced the co-founders to reevaluate their options. Given the present condition, Mina, Salman, Anas, and the four other team heads debated the most suitable operating model. While some favoured the existing pre-order model, others voted for the in-stock, cross-dock/ drop-shipping model.

The in-stock model involved investments in inventory and warehousing, while the cross-dock model required investment in technology. Each model had its pros and cons. They had to choose a model that supported and showcased the achievement of growth required by their investors, who had invested \$ 4.5 million in their business.

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MANAGING PRODUCTION AT SIENCI LABS: PUSH OR PULL?

Fatih Yegul, Conestoga College School of Business
 Stephen Thomson, Conestoga College School of Business
 Josh Hunchak (student author)

Case Objectives and Use

This case study is ideal for advanced Operations Management and Supply Chain courses at the graduate and undergraduate levels. This case can also be utilized in an operations planning course or a management information systems course, as one of the main themes is the relationship between business processes and the Material Requirement Planning (MRP) module as part of Enterprise Resource Planning (ERP) systems. This case study presents an opportunity for students to:

1. Benchmark the performance outputs of the push (MRP) vs. pull (lean) approaches to determine the most suitable one for a given production system.
2. Interpret a current Value Stream Map (VSM) to identify wastes (non-value-added activities) in operations and to recommend changes to the processes to reduce waste and improve lead time.
3. Recommend how to use MRP systems in pull-type visual production management systems to benefit from certain advantages of MRP software.
4. Calculate takt time in manufacturing operations to design processes based on customer demand.
5. Recommend appropriate measures for tackling supply disruptions.
6. Outline the critical factors in selecting MRP/ERP platforms for manufacturing businesses.

Case Synopsis

This case study describes the dilemma of Kye Allen, inventory and logistics manager at Sienci Labs (SL), a small business in Waterloo, Ontario, Canada, founded in 2016. SL assembled and sold CNC machines to hobbyists and small business owners. In May of 2022, SL had been struggling with supply disruptions and inventory problems that caused lengthy delays in product shipments. Allen had been working on preparing the new MRP (Material Requirements Planning) system for implementation to fix these problems and was almost ready to go live. At the same time, they just started an applied research project to optimize SL's production capacity based on lean production principles under the guidance of Allen's former professor PROF-1 along with PROF-2, who was the director of a research centre.

With the new MRP system, Allen aimed to control the assembly operations on the shop floor and have a firm grip on the supply of raw materials and parts. Most MRP systems, by design, assume a make-to-stock environment and tend to push production flow through work orders issued to shop floor employees. However, in the first weekly meeting of the research project, PROF-1 and PROF-2 asked Allen to explore the feasibility of moving to a visual make-to-order production management system based on pull principles instead of using work orders. That would require a radical shift in Allen's plans, but a pull system also had several advantages. Allen was in favour of the pull system but wasn't sure if it was the right time to switch to a make-to-order approach when the company was in the middle of an MRP implementation.

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DIGITAL ARMOR: A CYBER INSURANCE CATASTROPHE RESPONSE PLAN

Dalton Crabtree, University of South Florida (student author)
Matthew Mullarkey, University of South Florida (faculty supervisor)

Case Objectives and Use

This case can be taught to undergraduate college students at all levels in business, management, risk management, and/or insurance courses. This case can also be taught to graduate level business students in MBA, executive MBA, Master of Science, or doctorate level business, management, risk management, and/or insurance courses.

Issues addressed: Cyber catastrophe response planning, resource management, vendor management, risk management and insurance loss forecasting.

Skills developed: Critical Thinking: Analyzing the complexities of cyber insurance and identifying differences and similarities between cyber insurance and property insurance challenges.

Research Skills: Conducting thorough research on the various aspects of cyber insurance, including cyber breach incidents, incident response and recovery, and the role of claims adjusters.

Communication Skills: Students will effectively articulate their thoughts, ideas, and supporting evidence from the case.

Problem-solving Skills: The protagonist's challenge requires students to creatively problem solve, as the all proposed decisions presented in the case are feasible solutions. Students will be challenged to pick a decision, support their position with evidence from the case and research, and defend their position in discussion.

Case Synopsis

In January 2021, Gretchen Kaminski, Senior Vice President of Cyber and Liability Claims at the specialty reinsurance carrier, Manatee Specialty Insurance, was first faced with developing and implementing the organization's first cyber catastrophe ("CAT") response plan. The development of the CAT response plan as a preparative measure for when the first cyber CAT event will occur. This challenge has proven to be difficult as there has not been an insured cyber CAT event facing MSI, and, unlike property CAT events such as hurricanes, the data surrounding the scale, industry, geography, severity, and type of cyber CAT is not available for cyber insurers and reinsurers. Looking to maintain its position as a leader in the cyber insurance industry, Gretchen build a cyber CAT plan with various stakeholders and specialists to protect MSI's claims management process and to help policyholders recover from cyber-attacks.

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MIDDLEWARE MES: CONNECTING THE FACTORY FLOOR TO THE ERP

Chunhua Shen (student author), University of South Florida Muma College of Business
Matthew Mullarkey (faculty supervisor), University of South Florida Muma College of Business

Case Objectives and Use

The primary purpose of this case is to help professors who are looking for discussion cases for courses such as Supply Chain Management and Strategic IT Management. Discussions could be around “make vs. buy” decision, supply chain planning, factory SCADA adoption, software adoption and IT strategy. Both undergraduate and MBA/EMBA students could use this case for discussion. The case includes the macro overview and context of advanced manufacturing design and the specific factory dilemma that needs to be resolved. It can be related to many multi-site operations across industries.

In addition, professors may find it helpful for students to explore the social, economic, and geopolitical impacts over corporate globalization strategy, and the unique ODM/EMS industry dynamics impacted by Porter’s five forces. The similar patterns the major companies follow in this industry demonstrate how companies maximize their profits through globalization and supply chain management.

Case Synopsis

In April 2023, Mandy Ho, the PM of the enterprise IT system in ABC Mexico Corporation, was faced with a tough decision surrounding the selection of one MES (Manufacturing Execution System) solution from three different existing options. The company could choose an in-house built MES developed by the factory IT department over the years, a more mature commercial MES provided by a European company, or a forward-looking cloud-based MES that represented the trend in industry.

ABC Mexico Corporation was one of the major ODM (Original Design Manufacturer) and EMS (Electronic Manufacturing Service) providers in the world. The ODM/EMS market was a very competitive market with dozens of major players e.g., Foxconn, Pegatron, Quanta, Compal, Flextronics etc. serving a limited number of major customers, e.g., Apple, Huawei, HP, Dell etc. worldwide. Cost leadership and quality control were core competencies of an ODM/EMS.

An MES was a software system that monitors, tracks, documents, and controls the manufacturing process from raw materials to finished products. It was a functional layer between ERP (enterprise resources planning) and factory floor process control systems. Its data could provide insight into factory floor efficiency and the need for optimization. A high functioning MES was critical to reach the cost, productivity and quality goals of the factory. And for these contract manufacturing companies, the MES could make the difference in the overall success of the company.

The decision was hard because both the in-house and commercial MESs had their own pros and cons regarding costs, features, services, data integration, scalability, vendor relationship, and organizational structure. The cloud-based version fit the technology development trend for the industry, but it might disrupt the existing solutions and bring unforeseeable risks including the possibility that vital, secret factory operations information might be exposed. The situation was further complicated by the post Covid Pandemic economic downturn and the uncertain geopolitical environment affecting data location and storage. In this environment, the evaluation of multiple options for software consolidation across sites is critical.

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PHYSICIAN ADVISORY PROGRAM AT ROCHESTER REGIONAL HEALTH: AN EXERCISE IN PARTICIPATORY SOCIOTECHNICAL DESIGN

Sean Hansen, Rochester Institute of Technology
Quang “Neo” Bui, Rochester Institute of Technology
Matthew Phillips, Rochester Regional Health
Vamsi Yenugadhati, Rochester Regional Health
Balazs Zsenits, Rochester Regional Health

Case Objectives and Use

This case is intended for instructors teaching topics in information systems management and business process redesign. The case reflects the lived experience of managers and organization members seeking to finetune their business processes to better leverage their investments in an electronic health records (EHR) platform. It would be most appropriate for courses in information systems, operations management, and health informatics at the MBA and executive MBA levels. The case addresses issues of information systems adoption, business process redesign, and change management. As a result of preparing and discussing the case, students will develop insights around the value of collaborative design and the importance of business process redesign in the wake of information systems adoption.

Case Synopsis

This case is based on the actual events surrounding the development of the Physician Advisor (PAd) Program at the Rochester Regional Health (RRH) hospital system. Using a decentralized participatory model of information systems design, the PAd Program has empowered healthcare providers to refine organizational workflows with an eye to enhancing patient outcomes and organizational performance.

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SONOS INC.: PRODUCT DEVELOPMENT AT THE SPEED OF SOUND

David Wood, Ivey Business School
Scott Loveland, Ivey Business School

Case Objectives and Use

After working through the case and assignment questions, students will be able to do the following:

- Clearly articulate the differences between CM and JDM;
- Be able to determine the trade-offs between speed and cost versus control; and,
- Determine how to apply a value chain assessment to make better supply strategy decisions.

This case can be used in an operations or strategy course for senior undergraduate or graduate students. It can be used to introduce the topics of a value chain, partnerships or project management. This is also an ideal case to co-teach with a faculty member teaching project management or marketing.

Case Synopsis

Kurt Preston, Vice President of Global Sourcing & Product Operations at Sonos Inc. (Sonos), had been considering a Joint Development Model for future Sonos products. In 2022, Sonos began to expand their product offering to target value-conscious consumers and grow market share with more modest price points. Historically, Sonos designed every aspect of their products in house and used Contract Manufacturers (CM) for production. However, JDM approach offered an opportunity to partner with the supplier to potentially decrease the product development time and cost. However, JDM meant giving up control of several aspects of the product design and this had many at Sonos very worried.

With only days before Preston needed to prepare a recommendation on JDM to Patrick Spence, CEO of Sonos, on April 23, 2023, students will be asked to examine the differences between CM and JDM and provide their recommendation.

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Entrepreneurship, Family, and Small Business Cases

Track Chair: Erin Pleggenkuhle-Miles, University of Nebraska at Omaha

Co-Chairs: Bingbing Ge, Lancaster University Management School, and
Sonia Mehrotra, S.P. Mandali's Pri. L.N. Welingkar Institute
of Management Development and Research

Table 1

Session Chair: Marlene Reed

Cases	Authors
Magic Leap: Envisioning the Next Generation	Marlene Reed Rochelle Brunson Zhao Hui Li Sell
The Democratization of 5G Technology and Climate Change Action: The Dilemma of Mobile Operators, the Case of an Outsider “Free Mobile” in France	Mounir Chaouki Sr.
Let Them Drum: Managing for Growth	Renée Gravois Christopher Cassidy
Bharat Innovative Technical Solution: Focusing on Core Competency	Punyaslok Dhall
A Significant Product Development Problem at Yahoo!	Leslie C. Palich Patricia M. Norman Marlene Reed
Joseph's Dilemma: Start-Up or MBA	Rakesh Gupta

Table 2

Session Chair: Erin Pleggenkuhle-Miles

Cases	Authors
Bear & Moo: Sustainable Growth in Reusable Diapers?	Stephen Bowden Sarah Jones Jenny Gibb
The Good, The Bad, and The Ugly: A Supply-Side Story	Robert Boyle James (Jim) Fisher

The Village Gift Store and Café L'anse: Value Proposition Decision Time	Lisa Eshbach
Sama Holistic Skincare	Ebrahim Mazaheri Gina Grandy
Shift72: The Digital Transformation of Film Festivals and Beyond	Stephen Bowden
Hornets Nest in the Chestnut Tree: Benny Marino's Second Chance in the Restaurant Industry	Stuart Rosenberg

MAGIC LEAP: ENVISIONING THE NEXT GENERATION

Marlene Reed, Baylor University
Rochelle Brunson, Baylor University
Zhao Hui Li Sell, Entrepreneur

Case Objectives and Use

This case was developed for use in an entrepreneur classroom at the undergraduate level. The case might also be used in an entry-level engineering course because of the introduction of the level of negotiation often needed between the engineers on a project and the marketing and supply chain personnel. The key conceptual foundations presented in this case are the differences between Augmented Reality (AR) and Virtual Reality (VR), the complexity of managing the development of high-tech products and the internal negotiation necessary to bring high-tech products to the marketplace.

Case Synopsis

This case relates the dilemma of Clinton Carlisle, Senior Director of Advanced Photonics at Magic Leap, in his attempt to bring the next generation of their Augmented Reality (AR) glasses to the marketplace. The first version of these glasses had been successfully launched, and the company's Board of Directors had given Clinton a mandate to have the next generation ready in the Fall of 2020; and it was now the Spring of that year. He had just met with the marketing and supply-chain employees of the company, and they were reticent to approve the launch of this new generation of Magic Leap because of their concern about potential liability of the product. Clinton had to determine the best way to negotiate a settlement with these employees so that his team could move the product along to production in the coming months.

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 2023 Conference, San Antonio, Texas, USA, October 5-7, 2023. © 2023 by Marlene Reed, Rochelle Brunson, Zhao Hui Li Sell. Contact Person: Marlene Reed, Baylor University, Entrepreneurship & Corporate Innovation Department, (254) 652-0445, Marlene_Reed@baylor.edu.

THE DEMOCRATIZATION OF 5G TECHNOLOGY AND CLIMATE CHANGE ACTION: THE DILEMMA OF MOBILE OPERATORS, THE CASE OF AN OUTSIDER “FREE MOBILE” IN FRANCE

Mounir Chaouki, UM6P/Emines School of Industrial Management

Case Objectives and Use

This case is suitable for undergraduate or graduate courses on entrepreneurship and/or corporate social responsibility. The objectives are:

- Identify and understand the challenges associated with the climate change and energy consumption.
- Evaluate the impact of political, regulatory, social, environmental to the telecom operators.
- Identify and understand the impact of key strategic decisions the telecoms operator must take to ally the economic growth while fighting against the climate and social impacts of 5G introduction and democratization.

Case Synopsis

The case depicts the story of a Telecom operator in France, an outsider in French Market, providing a real competitive products and continuous innovation in the market.

“A smartphone has no exhaust. We do not necessarily see that it pollutes, it is a little immaterial»¹, explains Anthony Colombani, director in charge of social and environmental responsibility at Bouygues Telecom. From raw materials needed to produce it to distributing it in France, the smartphone fly all over the world, with social and environmental impacts, before it landed in France!

With the succession of COP climate conferences and the Paris commitments to reach net zero by 2050, telecom operators are more and more challenged by their consumers and NGOs on the climate and social impact of technologies such as 5G. Free mobile, a new mobile operator outsider in the French market with a unique positioning "offer at a low price and without contractual commitment", introduced 5G innovation in France and is part of the fight against climate change and social impact. The free mobile telecom operator, is facing a dilemma which is “how can I keep bringing to market 5G mobile services with the highest quality possible while at the same time reducing the energy consumption and social impact and delivering against the global climate action agenda?”

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¹ https://www.francetvinfo.fr/replay-radio/nouveau-monde/operateurs-telecom-tous-eco-responsables_4810217.html

LET THEM DRUM: MANAGING FOR GROWTH

Renée Gravois, Sam Houston State University
Christopher M. Cassidy, Sam Houston State University

Case Objectives and Use

The objective of this case is to develop students' decision-making skills related to the management and growth of the not-for-profit organization, Drum Buddies. The case is designed for use in undergraduate entrepreneurship, small business, or not-for-profit management courses. The case could also be used in course modules covering the topics of organizational growth, organizational structure, and/or organizational control systems.

This case requires students to distinguish between the symptoms of organizational problems and actual organizational problems. The protagonist's work-life imbalance is the symptom of a mismatch between organizational strategy and structure. Once readers recognize the actual problem, they can address the issue of determining an organizational structure that better fits the mission and vision of the not-for-profit. The unstructured nature of the problem faced by the protagonist will lead to a broad range of potential recommendations for Drum Buddies.

Case Synopsis

This case presents challenges faced by Rico Hernandez, Founder and Executive Director of Drum Buddies, a not-for-profit organization dedicated to improving quality of life for children with disabilities through holistic percussion experiences. During the 12 years since its founding, Drum Buddies had grown from a small one-day-a-week program at one middle school to five Drum Buddies Chapters serving children throughout the greater Houston area. By the spring of 2023, Drum Buddies was poised for further growth. Rico had numerous valuable opportunities to grow the organization, but he also loved his family, his full-time job, and his music. Unfortunately, the competing demands for his time from his other activities required compromises and made it difficult to invest the time needed to continue to grow Drum Buddies.

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BHARAT INNOVATIVE TECHNICAL SOLUTION: FOCUSING ON CORE COMPETENCY

Punyaslok Dhall, Xavier Institute of Management

Case Objectives and Use

The case should ideally be discussed in the first year MBA course for Business Strategy. The case works well in courses on strategic marketing or entrepreneurship. It also works well with executives specializing in project management. The objectives are:

- Review three common strategic dimensions of value exploration, value creation and value delivery, in a small firm in service sector
- Explore approaches as how can a company focus on its core competency and capabilities/infrastructure to deliver unique value

Case Synopsis

This disguised case based on the actual events, describes a situation facing the protagonist Umesh at Bharat Innovative Technical Solution (BITS). BITS is civil engineering consultancy firm (a partnership firm), established in 2006, focused on architectural, structural and environmental domains. Umesh, a civil engineer by profession, started his career in academics but moved to structural consultancy. His venture deals with Detailed Project Report (DPR), architectural plans, structural solutions and civil construction monitoring. With the complex regulatory requirements in civil structural consultancy domain and market trends Umesh had made several changes to his business objectives and processes. The case has two major dimensions. First one is to identify the core competency and area of focus for the business. However, the core competency should be mapped onto the market trends and demand for the services. The second dimension is related to the soil testing laboratory and its utilization factor. Umesh should decide how to realign the laboratory to the schema of the present business verticals. With trained human resources being a major bottleneck in running the laboratory, Umesh has to decide the future of the laboratory based on both engineering and business aspects.

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A SIGNIFICANT PRODUCT DEVELOPMENT PROBLEM AT YAHOO!

Leslie C. Palich, Baylor University
Patricia M. Norman, Baylor University
Marlene M. Reed, Baylor University

Case Objectives and Use

This case was written to be used in undergraduate and graduate entrepreneurship and strategy courses. The theories of Agile Product Development, Lean Startup and Lean Product Development are explored in the instructor's manual along with an application to the unsuccessful development of the proposed Next Gen dashboard at Yahoo. The case relates the story of Liam O'Connor, a software engineer at Yahoo, and his concern over the failure of the dashboard that he and his team had been laboring over for some time and the causes of that unsuccessful venture.

Case Synopsis

Yahoo, to regain its competitive advantage, decided to redesign its website interface. The new user dashboard, dubbed Next Gen, was scheduled to launch in 2021. Prior to the development of Next Gen, Yahoo users had been spending less time on the website and the company wanted to make their website "stickier." Rather than follow its standard product development practices, which conformed to agile/lean development principles, Yahoo developed Next Gen without user involvement and feedback in an effort to deliver a significantly upgraded dashboard website and increase the value of Yahoo. Unfortunately, when users were finally asked to beta test Next Gen, the reviews were very negative. While developers had programmed the dashboard to allow users to customize the dashboard, users found the vast array of choices to be overwhelming. Given the extremely poor reception from users, the protagonist in the case—Liam O'Connor, a software engineer, had to provide a recommendation to his superiors about what Yahoo should do with Next Gen.

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JOSEPH'S DILEMMA: START-UP OR MBA

Rakesh Gupta, IMT-GHAZIABAD, India

Case Objectives and Use

This case can be taught both at an undergraduate as well as in MBA program. It is positioned at the beginning of MBA course and can be used in “Entrepreneurship and New Venture Creation” course focusing on the skill sets required to start a venture and can be taken-up in Entrepreneurship Workshops aimed at budding entrepreneurs. The case is designed to be taught in a class of 90 minutes. The case puts the students into the shoes of Joseph, founder of K.J Ventures, who has to make a difficult choice about whether to continue with his venture or join an MBA program. Working through the case and assignment questions will give students a deeper insight into:

1. To understand the difference between solving a problem and developing a business idea.
2. To realize the pitfalls of taking decisions in overenthusiasm rather than assessing ones’ readiness before becoming an entrepreneur.
3. To understand the need to develop a business plan before starting a business venture.
4. To develop an understanding about when to persist and when to move on.
5. To create a plan of action when available choices create a conflict of interest.

Case Synopsis

The case highlights the career choice dilemma faced by Joseph, whether to continue with his start-up K.J Ventures or pursue an MBA degree? Joseph was concerned about waste management issue in his native place Kumbalangi and wanted to solve this problem. While working in his college laboratory, he developed a process to convert biodegradable waste collected from his native place into bio fertilizers and organic manure. In his enthusiasm, he started K.J Ventures in 2016 to build on this idea while pursuing his education. After completing his engineering degree in 2018, he devoted two years full-time to this venture but couldn’t find much success and encountered a series of challenges for which he was not prepared. Considering the state of K.J Ventures, he started preparing for MBA entrance exam and got admission in a top-notch Business School. Meantime, he received a communication from Kerala Start-up Mission accepting his application for incubating K.J Ventures and a call from his friend Jibin from Heythen Gelatin to renew their ongoing waste management contract with K.J Ventures. Now he is caught in two minds; whether to pursue an MBA degree or continue to focus on his venture and capitalize on this new window of opportunity?

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BEAR & MOO: SUSTAINABLE GROWTH IN REUSABLE DIAPERS?

Sarah Jones (Student author) Waikato Management School, University of Waikato, New Zealand

Stephen Bowden (Faculty supervisor) Waikato Management School, University of Waikato, New Zealand

Jenny Gibb (Faculty supervisor) Waikato Management School, University of Waikato, New Zealand

Case Objective and Use

The case was developed for an undergraduate (senior-year) entrepreneurship class and has been subsequently class tested. It has also been used for an MBA class on strategy and there is potential for use in a digital business course as this is an e-commerce business. The case explores the growth challenges of a small online business as it seeks to continue its high growth despite challenges from under developed systems and cashflow particularly. The analysis focuses on a capabilities analysis to help assess the realistic prospects for growth.

Case Synopsis

In 2022 Hannah Porter, the founder of Bear & Moo – a New Zealand-based online retailer of reusable cloth diapers and other baby products – was enjoying the fruits of her labours as she looked over impressive growth numbers. Hannah had taken advantage of social media and influencers to grow her brand and expand her product range. But now problems were beginning to mount. Inventory space was becoming tighter and tighter, lead times were becoming longer, and she needed more staff so that Hannah could focus on growing the business. All Hannah could see were growth options, but she needed the time to pick the right ones to achieve her goal of tripling the business in the next 3 years.

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THE GOOD, THE BAD, AND THE UGLY: A SUPPLY-SIDE STORY

James Fisher, Saint Louis University
Robert Boyle, Saint Louis University

Case Objectives and Use

This case explores the intersection of entrepreneurship, marketing, and supply chain management. This multi-disciplinary focus makes the case a better fit for advanced undergraduates or graduate students enrolled in Entrepreneurship, Marketing Management or Supply Chain Management courses but less well suited for students in introductory-level courses.

Case Synopsis

"The Good, The Bad, and The Ugly: A Supply-Side Story" follows the entrepreneurial journey of Mike Golomb as he makes his foray into the business of selling ugly Christmas sweaters. It begins when Mike's mother, a retired kindergarten teacher, suggests that he take some vintage sweaters she has in her personal wardrobe collection. Initially put off by the idea, Mike's perception changes when he needs an ugly sweater for a party but can't find one. He contacts his mom, who eventually helps by finding a stash of 40 Christmas sweaters at Goodwill. Mike seizes the opportunity by buying them for \$2 each and re-selling them on eBay for a generous profit.

Seeing that the idea has potential, Mike discovers that he can purchase used Christmas sweaters in bulk from Goodwill for a lower cost, and this allows him to grow his business even further. The venture flourishes until big retailers like Walmart and Target enter the market, causing a decline in his sales. However, Mike maintains his momentum by catering to customers who value original vintage sweaters rather than reprints. He also forms partnerships with companies like White Castle, leading to collaborations and customized designs.

Despite the challenges from the COVID-19 pandemic and the associated decline in demand for party attire, Mike has continued his success by introducing ugly sweater designs for other holidays, collaborating with additional popular brands, and even diversifying into completely new product lines. Mike's innovation and grit have allowed him to navigate the changing market, expand his team, and establish a unique position in the world of ugly sweaters.

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THE VILLAGE GIFT STORE AND CAFÉ L'ANSE: VALUE PROPOSITION DECISION TIME

Lisa Eshbach, Ferris State University

Case Objectives and Use

The case is designed to be used in a course in which students focus on small business and entrepreneurship, and particularly start-up planning. The case would be useful in a graduate-level or upper-level undergraduate Entrepreneurship or Small Business Management course.

The case provides students opportunities to utilize analytical, and decision-making techniques of an entrepreneur changing business processes and investigating a new business opportunity. Students will evaluate the financial feasibility of changes to an existing business and a business expansion using the Business Canvas, sensitivity analysis, and breakeven analysis.

Case Synopsis

Payne Chassen, a welder and metal artist by trade, and Bill Steinhardt, a former software engineer, were co-owners of The Village Gift Store and Café L'Anse. The Village Gift Store opened as an artisan collective shared use space model. It was made up of 30 artists who rented space for \$1/day. Café L'Anse served as a shared use kitchen serving the local community patrons and functioning as an incubator space for local food entrepreneurs.

The partners complimented each other's business styles. Both were active in the businesses from a financial and operations standpoint. However, Steinhardt seemed to gravitate more to monitoring the financials while Chassen worked on developing new business ideas and using social media to promote both businesses.

The current business model seemed to work okay for the Café however, the recent financials revealed a different story for the Gift Store. So, the owners were contemplating several different changes. Steinhardt was mulling over options of changing the rent and commission structure for Gift Store. Additionally, he wanted to be proactive with scaling the Café with an online ordering system. Simultaneously, Chassen was looking at opening up a Beverage Counter that would serve specialty coffee, juices and smoothies.

The case provides a general overview of Michigan's Upper Peninsula, its unique culture, and the considerations involved in starting a business and using a share use business model. It requires the reader to utilize the analytical, and decision-making techniques of an entrepreneur changing its business processes and investigating a new business opportunity.

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STARTING FROM SCRATCH: SAMA HOLISTIC SKINCARE

Ebrahim Mazaheri, Wilfrid Laurier University
Gina Grandy, University of Calgary

Case Objectives and Use

This case is ideally suited for undergraduate courses in entrepreneurship. It would be best placed in a class designed to analyze early stage growth decisions and / or women's entrepreneurship.

The case exposes students to the experiences of an immigrant woman entrepreneur from Iran and how culture informs her clientele base and unintended positioning. With limited cases available on women entrepreneurs and even fewer on women entrepreneurs who are racialized, this case provides a unique opportunity to students.

The learning objectives for this case are as follows:

1. To understand entrepreneurial motivations and measures of success for women starting and growing firms;
2. To identify the unique challenges facing women entrepreneurs and how intersectionality informs the entrepreneurial experience; and,
3. To assess early stage growth decisions for entrepreneurs

Case Synopsis

Samaneh Abidi was a woman immigrant entrepreneur in the skincare and hair cosmetics business. She started first a mobile aesthetics services in response to organic demand for her services triggered by her Instagram postings and clients from former positions she held in skincare and hair cosmetics. The small business was also started out of necessity following the closure of the clinic where she worked during COVID-19. As of May 2023 she operated Sama Holistic Skincare out of a room in her home. As a relatively new Canadian from Iran, she attracted a clientele who were also of Iranian heritage and she created an experience for them which drew from her culture. While the demand for her services was organically growing, in large part because of her regular Instagram postings, appointments were sporadic and she had both the capacity and desire to grow. Her financial resources were limited and she was cautious when spending on promotion and advertising. She needed to increase sales by the end of 2023 otherwise she would have to find another way to supplement her income and she wasn't sure where to start.

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SHIFT72: THE DIGITAL TRANSFORMATION OF FILM FESTIVALS AND BEYOND

Stephen Bowden, Waikato Management School, University of Waikato, New Zealand

Case Objective and Use

The case was developed in New Zealand for an undergraduate strategy class and has subsequently been taught at both undergraduate and MBA level. It would also be useful for an entrepreneurship class and digital business. The case provides the opportunity for a full analysis of the film festival industry as sweeping change occurred in digitalization due to Covid. Particularly there is the opportunity to explore the capabilities of Shift72 in relation to a changing market as well as growth opportunities in the adjacent markets of cinemas (through video-on-demand) as well as events more broadly.

Case Synopsis

David White, Shift72's founder and CEO, saw a future filled with opportunity. Over the past 11 years Shift72 had emerged as the global leader in video on demand platforms to film festivals and cinemas. Prior to Covid that still meant a struggle to convince festival organisers and cinema owners to complement their physical offering with a digital one. With the advent of Covid the world changed overnight and digital often replaced physical. The change was seismic for Shift72 and saw their relationships with iconic festivals like Cannes, Sundance and South by Southwest expand greatly. David knew the future was hybrid, but the question was how best to take advantage potentially across the entire event space.

The case explores a company offering digital platforms to an industry with significant impediments to adoption. The advent of covid and the subsequent need for digital platforms to replace initially and then complement physical presence at film festivals had transformed the industry. Shift72, as the market leader supplying top-tier film festivals had a window of opportunity to leverage their capabilities for market growth and expansion into new adjacencies like cinemas and events.

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HORNETS NEST IN THE CHESTNUT TREE: BENNY MARINO'S SECOND CHANCE IN THE RESTAURANT INDUSTRY

Stuart Rosenberg, Monmouth University

Case Objectives and Use

This case is primarily intended for undergraduate courses in Entrepreneurship to study the elements of a business model for entrepreneurs. It is also suitable for undergraduate courses in Organizational Behavior to apply the concept of conflict resolution as well as to distinguish among the typologies of organizational culture. Its focus on the restaurant industry serves as the backdrop for exploring these concepts and the decision that Benny Marino needs to make.

Case Synopsis

Benny Marino, a longtime chef and restaurant owner, has been offered a separation agreement in November 2021 by the owner of a large New Jersey restaurant for whom he is employed as a special consultant. Marino signed a seven-year contract in 2016 to help turn around the restaurant, The Chestnut Tree, and the recommendations that he put forth were successful in doubling its sales in his first year in his consultant role. Marino was passionate about the restaurant, but his ideas caused ongoing resentment from the restaurant manager and, increasingly, from the owner. Due to what he'd accomplished, Marino saw himself as the face of the restaurant and he now he needed to decide whether to take a cash settlement to allow the owner to break his contract or to do something else.

Benny Marino had started out as a dishwasher at a local restaurant while still in high school, and he rose to a highly respected position in the industry. A combination of business issues and personal issues, however, led to his leaving the industry completely at age 45. He took on a number of various jobs over the next sixteen years, all the while aching to once again return to the restaurant business. When he received the offer to become a consultant for the New Jersey restaurant, this became his second chance in the restaurant industry and it meant the world to him.

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Marketing Cases *and* International Business Cases

Track Chairs: Silvia Cacho-Elizondo, IPADE Business School (Marketing),
and Grishma Shah, Manhattan College (IB)

Co-Chair: Michael Goldman, University of San Francisco (Marketing)

Table 1

Session Chairs: Silvia Cacho-Elizondo and Michael Goldman

Cases	Authors
BBVA México: The New Challenges of Digital Transformation	Silvia Cacho-Elizondo
Designing an Influencer Program in China: Chopard Campaign by Hylink	Léna Griset Marie-Cécile Cervellon Loick Menvielle
Bachaa Party: Navigating the Path to Building Brand Vision Amid Uncertainty	Nida Aslam Khan
Hero Certified Burgers	Kate Stilwell Trent Tucker

Table 2

Session Chair: Grishma Shah

Cases	Authors
Caverton: International Strategy of Soaring into African Markets in Turbulent Weather	Adeniyi Damilola Olarewaju Sunday Abayomi Adebisi
Major League Baseball: Negotiating Over the Creation of an International Draft (A) and (B)	Paul Seaborn Alexis Foster
Pharma Sales Force – Managing Data, Dilemma, And Decision	Renuka Kamath Aditya Karthic. I
Tejas Express: Premium Private Train Project through Public Private Partnership in Indian Railways	Rakhi Thakur

BBVA MÉXICO: THE NEW CHALLENGES OF THE DIGITAL TRANSFORMATION

Silvia Cacho-Elizondo, IPADE Business School

Case Objectives and Use

This case is designed to be used in Executive Top Management programs as well as MBA and master's degree programs. Additionally, it could be used in focused programs for the banking industry or other industries that are undergoing a digital transformation process. It can be used to cover topics such as digital strategy, distribution channels, segmentation, marketing strategy design, innovation in marketing processes (ex. new applications using Artificial Intelligence) and sales force management in the digital era.

Learning Objectives

1. Understand key stages of a digital transformation process
2. Assess the process needed to design a new value proposition in a changing market.
3. Explore the importance and new roles of a sales force with a new relationship and distribution model
4. Establish a new segmentation of customer.

Case Synopsis

BBVA Mexico faced the challenge of digital transformation, now with a significant part of its sales coming from digital channels. The director of Client Solutions, Hugo Nájera, reflected on the impact of technology on employment and the need to be able to retain branch executives and avoid closing branches. In the meeting he had with the general director of BBVA Mexico, Eduardo Osuna, and other top executives, they analyzed the objectives that the five-year Marketing Plan (2023-2027) should have depending on the strategy that was decided to follow. Eduardo emphasized the need to link technological innovation with traditional banking in order to provide better value to customers.

The rapid adoption of digital banking had led to a decline in branch visits, as most customers now preferred to use the BBVA mobile app. This change in customer behavior was not exclusive to Mexico, but was a global trend in the banking sector. The experience of BBVA Spain was cited, where they had to adjust their transformation plan and close branches due to growing competition and the rise of digital transactions. However, Hugo believed that the Mexican context was different from the Spanish one and suggested exploring alternative approaches instead of following the same path as the Spanish. The dilemma they faced was whether to reduce the number of branches and manpower or whether to leverage existing infrastructure to offer more complex products and services.

The first option, favored by shareholders, would generate immediate cost savings but would result in significant job losses. The second option was riskier and required investment, training, new incentives, redesigned sales protocols, and sophisticated analytics models. Hugo was responsible for designing a solid five-year Marketing Plan to balance the bank's revenue growth, digital transformation, and the well-being of Mexican families, particularly in times of crisis.

The key question was how to create a new distribution and relationship model that would leverage the existing branch network structure while meeting the Board's expectations of increasing bank revenues and continuing the bank's digital transformation.

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DESIGNING AN INFLUENCER PROGRAM IN CHINA: THE HYLINK X CHOPARD CAMPAIGN

Marie-Cécile Cervellon, EDHEC Business School
Léna Griset, IAE Nice, Université Côte d'Azur
Loick Menvielle, EDHEC Business School

Case Objectives and Use

The target audience for this case is MBA and Master's students in Marketing, Communication and Luxury. This case study aims to demonstrate the significance of influencer marketing by taking into consideration the specificities of the Chinese market and the importance for the content produced by influencers to be in line with the brand's storytelling. Students will have to think about all the parameters involved in order to determine the best way to ensure the success of Chopard promotional campaign in China. Based on the analysis of the situation discussed, students will have to decide how to convey the full symbolism of this watch through an influencer program. This will also lead them to question other aspects related to the problematic, such as how to select the right influencers; what type of content to create and under what conditions; which social network to privilege and, *in fine*, how to measure the impact of the campaign. This case introduces students to the backstage of an impactful influencers' campaign. Through this material, students will discover how Hylink, China's leading digital and influencer marketing agency designed a "custom-made" influencer program for Chopard. This scenario takes place during the global unveiling of the Alpine Eagle watch from the luxury brand, aiming for a successful launch on the Chinese market. Chopard decided to rely on a renowned Chinese agency for their communication; to coordinate with the head office and keep the same pace with the rest of the world. This case discusses the strategic importance for luxury brands to build brand awareness through an influencer program when launching a new product in China.

Case Synopsis

This case introduces students to the backstage of an impactful influencers' campaign. Through this material, students will discover how Hylink, China's leading digital and influencer marketing agency designed a "custom-made" influencer program for Chopard. This scenario takes place during the global unveiling of the Alpine Eagle watch from the luxury brand, aiming for a successful launch on the Chinese market. Chopard decided to rely on a renowned Chinese agency for their communication; to coordinate with the head office and keep the same pace with the rest of the world. This case discusses the strategic importance for luxury brands to build brand awareness through an influencer program when launching a new product in China.

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BACHAA PARTY: NAVIGATING THE PATH TO BUILDING BRAND VISION AMID UNCERTAINTY

Nida Aslam Khan, Institute of Business Administration, Pakistan

Case Objectives and Use

The case can be used in a faculty seminar (such as a seminar on market penetration, for the course of Strategic Management and Brand Management) for undergraduate class in marketing plus executive students as well. The objectives are:

1. Review the process of market/brand penetration in a highly fragmented emerging market with extremely volatile political situation.
2. Evaluate the challenges of operating in apparel industry pertaining to childrenswear.
3. Explore the critical importance of having brand vision and communicating its significance to the employees.

Case Synopsis

This is a work-in-progress teaching case along with a teaching note. In June 2022, Syed Osama Sarwar, Head of Marketing of *Bachaa Party* is struggling with aftermath of pandemic with rising inflation in Pakistan. He and the Managing Director, Ahmed Javed are the brains behind with the mild success of the company, a well-known children's retail chain headquartered in Karachi, now faces a new crossroads, While the business has been successful with its traditional practices, Sarwar wants to establish *Bachaa Party* as a market leader, to ensure not just survival, but success, in an era of ever-increasing uncertainty and to create an indelible motivation within its team members so that they can gear up for Ramadan which is just round the corner.

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HERO CERTIFIED BURGERS

Kate Stilwell, Thompson Rivers University
Trent Tucker, Thompson Rivers University

Case Objectives and Use

This case focuses on value proposition development for a brick-and-mortar burger enterprise that has recognized a lucrative opportunity into the quickly expanding market of the online fast-food industry. It can be used in a strategic management, marketing, or ecommerce course at the fourth year undergraduate or MBA level. The issue in the case centres around recognizing and developing a marketing platform that directly targets the newly acquired digital customer in the Quick Service Restaurant (QSR) industry, while accommodating an intermediary partner or virtual kitchen. Students will be asked to analyze and strategize a multiple fit value proposition design specific to Hero Certified Burgers as they move their product through the partner kitchen to the online customer base. There is room in the case analysis for new and creative ideas on how to accomplish this.

Case Synopsis

It is June 2022 and through partnering with current food service kitchens, other than their own physical locations, John Lettieri (CEO and founder of Hero Certified) has designed a unique business model to move his company into the world of online ordering while keeping capital investment to a minimum for both Hero and the partnering company. Virtual/Partner kitchens are used to service Hero's online fast-food customers, while preserving the branding that Hero has developed over the last 17 years. Lettieri positions Hero Certified as a higher end option for fast food, boasting ethically sourced and traceable ingredients without the use of hormones and antibiotics. His model claims additional revenue for the partner kitchen with minimal capital or time investment, but it is not rolling out the way he had envisioned. Now he is left to decide what aspects of the model need to be addressed to improve his B2B growth rate, while maintaining his current branding.

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

Adeniyi Damilola Olarewaju, University of Galway, Ireland
Sunday Abayomi Adebisi, University of Lagos, Nigeria

Case Objectives and Uses

This case concerns the internationalization 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 for owner-manager programs where participants are interested in international expansion. Students studying courses or modules in international business, entrepreneurship, strategic management, international strategy, 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; and application of multi-country macroeconomic and statistical data in analyzing internationalization decisions.

Case Synopsis

On the morning of Wednesday, 30th March 2022, 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 2022. 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 but Nigeria's major economic indicators suggested a post-COVID economic recovery 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? Further, as metaphor for turbulent weather, he is not certain the extent to which the post-COVID economic recovery 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.

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MAJOR LEAGUE BASEBALL: NEGOTIATING OVER THE CREATION OF AN INTERNATIONAL DRAFT (A) & (B)

Paul Seaborn, University of Virginia
Alexis Foster (student author), University of Virginia

Case Objectives and Use

The case is intended for use by both undergraduate and graduate students. It is suitable for use in courses that explore global/international management and strategy, negotiation, ethics, and human resources. The case is framed around a labor negotiation between Major League Baseball (MLB) and the Major League Baseball Players Association (MLBPA). The case highlights a range of key decisions that organizational leaders must make in a global labor environment where workers originate from a wide variety of countries. The case consists of a pair of parallel (A) and (B) versions, one written from the perspective of MLB (A) and one written from the perspective of the MLBPA (B). Each version consists of a common general overview of MLB's history and current environment as well as differing professional and personal details and negotiation priorities for each party. By distributing version (A) to some students and version (B) to other students, instructors can set up a negotiation exercise where students can apply their understanding of the case to a live negotiation and use the provided negotiation worksheet to record the outcome. The negotiation experience can then serve as the basis for an instructor-led debrief.

Case Synopsis

This case is set in July 2022 and uses a well-known and highly visible organization, Major League Baseball, to illustrate the complex and challenging situations that arise as organizations become increasingly international. Rob Manfred, commissioner of Major League Baseball (MLB) and Tony Clark, Executive Director of the Major League Baseball Players Association (MLBPA), are in negotiation over potentially creating a first-ever international MLB draft. The oldest professional sports league in the world, MLB once operated solely within the United States but has become increasingly international both in terms of the number of international players and the level of fan interest from around the world. At the time of the case, in July 2022, the league continued to have an entry draft only for players who live in the United States, Canada and Puerto Rico whereas players from the rest of the world are considered free agents who can be signed by any MLB team. This arrangement has created two very distinct pathways for players to enter the league, with a variety of resulting positive and negative impacts on players and team owners. The most recent collective bargaining agreement between MLB and the MLBPA, signed in March 2022, created a brief negotiating period for Manfred and Clark to see if they can reach an agreement on a new international draft format to replace the current system before July 25, 2002. By providing students with the perspective of one of the two senior negotiators, students are challenged to translate their general thoughts about the case and international management into specific negotiating positions.

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PHARMA SALES FORCE – MANAGING DATA, DILEMMA, AND DECISION

Renuka Kamath, S P Jain Institute of Management and Research, Mumbai (Faculty Supervisor)
Aditya Karthic. I, Alumni, S P Jain Institute of Management and Research, Mumbai (Alumni Author)

Case Objectives and Use

This case is suitable for use in graduate-level management programs, both MBA and Executive MBA. It can be useful in courses such as Sales Management, Marketing Strategy, and Marketing Analytics. The case can also be used to introduce students to the basics of sales, sales productivity, territory management, managing a team, and business forecasting. Students will gain a step by step understanding of business hygiene and how just looking at overall sales numbers may not be conclusive, but a deep dive into effort and productivity is far more useful for forecasting.

After completion of this case, students will be able to appreciate the challenges in managing a Pharma sales team by learning the nuances of business hygiene. They will learn how a new manager of a Pharma sales team can analyze data of a sales territory by balancing both quantitative and qualitative factors. The students will be able to understand the approach of sales and effort hygiene, especially correlating data points that may not be directly connected but have a dependency. Finally and importantly, they will learn to forecast and build a business projection.

Case Synopsis

Innov-Health, a leading 100-year-old global healthcare pharmaceutical company, was headquartered in the USA, with a portfolio of Oncology, Immunology, Neurosciences, Metabolic, Dermatology, and Pain management. In India, its brand Acnend, an acne cream, the only product in the division was the market leader. Pradeep Vir joined this division as the Area Business Manager managing West Bengal, an Eastern state of India, end of March 2022. He found that Acnend was sold through pharmacies via distributors based on the prescription of Doctors. Acne cream as a product category was highly competitive, and Innov's Acnend was doing well at the end of the year's first quarter (January to March 2022) when Vir joined the organization. His team of four District Managers (DM) was performing above plan for Quarter 1, which pleased him.

However, Vir's reporting manager, the Regional Sales Manager, Salil Govind, was sure Vir's team could do much better and suspected that the territory might be underperforming. He tasked Vir to urgently submit a revised sales projection, as Quarter 2 (April to June 2022) was beginning. Apart from the sales performance, Vir's analysis of other data essentials for business hygiene left him perplexed. While his observation that his team was doing well was right regarding their target achievement, there was clearly a differential effort being put in by each member. In addition, other business metrics like actual calls, call conversion to prescriptions, and distributor stock levels were concerning. Vir was conscious that the overall performance would reflect his managing the team for the next quarter. He was keen to do well in his new job and knew the next quarter's projection needed careful attention. Where should he begin with the data?

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TEJAS EXPRESS: PREMIUM PRIVATE TRAIN PROJECT THROUGH PUBLIC PRIVATE PARTNERSHIP IN INDIAN RAILWAYS

Rakhi Thakur, S. P. Jain Institute of Management and Research, Mumbai, India

Case Objectives and Use

Instructors can teach this case as part of the first-year required curriculum of Marketing Management in an MBA program or an executive program in the marketing management course. The case study is suitable to illustrate the concepts of the 5 C framework, Ansoff's Matrix, and new product development. Instructors can also use this case in the New Product Development elective. Instructors can use this case to discuss the opportunities and challenges for a large company in a highly competitive market.

Case Synopsis

Indian Railways, one of the largest train networks in the world, was positioned as Mass Transportation System in India. With an extensive network, the public sector organization had limitations on improving the quality of services, investing in innovative products, and offering premium trains comparable to developed countries. Indian Railways was running into losses, and to get better quality of services, Central Railway Minister Piyush Goel and his team proposed Public Private Partnership for Indian Railways (IR) in the country. With a host of differentiated products in the market, IR had to think through the positioning of its offerings and innovations to keep its customers satisfied. The case gives a snapshot of the first private premium passenger train Tejas Express (TE), introduced by IR between New Delhi and Lucknow. First, Tejas Express train competed with another seasoned premium train Shatabdi Express operated by the parent firm on the same route. The first premium private train TE attracted customers by delivering lower travel time, higher level of services, and better security features. The case further illustrates the different product types and brands offered by IR.

Further, the case discusses various customer segments serviced by the organization and its challenges in profitably running the business. The organization was at the crossroads of inviting private players to modernize and invest in innovation and technology to offer premium private trains. Piyush Goel had to decide whether to expand the Tejas Express portfolio in other routes or wait for further alternate technology disruption developed by different private players under the supervision of the parent organization.

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Organizational Behavior/Human Resource Management Cases

Track Chair: Jyotsna Bhatnagar, Management Development Institute

Co-Chair: Bruce Thomson, MacEwan University

Session Chair: Bruce Thomson

Cases

Post-COVID Succession Challenges at Christian Horizons

Authors

Joy Wilson
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Keeping the Wheels Turning

Zachary Hubbs

Neza at Crossroads: A Working Mother's Dilemma

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Ismail is in Noyabrsk

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Too Good to Be True! Paid Parental Leave for 5 Years

Holly Chiu
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One, Two, Three: Leadership at the Rijksmuseum

Karen Boroff
Anne-Marie Gilis

Retaining an Ethic of Care: Safe Haven Property Management Inc.

Melanie Reed
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Alphabet, Inc.: To DEI Or Not To DEI

Malay Krishna
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POST-COVID SUCCESSION CHALLENGES AT CHRISTIAN HORIZONS

Joy Wilson (student author), Gordon S. Lang School of Business and Economics, University of Guelph
 John Walsh (faculty supervisor), Gordon S. Lang School of Business and Economics, University of Guelph

Case Objectives and Use

This case provides students with an opportunity to explore a human resources challenge faced by many human service organizations. While the case highlights a post-pandemic non-profit context, discussion questions call worthy attention to common leadership succession challenges common to various sectors. It will benefit students who wish to explore causes for emerging leader hesitancy and strategies to engage potential leadership candidates.

The case will provide insight into:

1. Challenges related to filling leadership positions in a non-profit human services environment.
2. Potential sources of hesitancy for emerging leaders.
3. Recruitment, management, and leadership development strategies required to maintain a strong pool of internal candidates for frontline leadership positions.

Case Synopsis

At Christian Horizons, a growing non-profit developmental services organization, Program Managers (PMs) provided critical frontline leadership to supported living home teams of Direct Support Professionals (DSPs). With a vision to see “people who experience disability belong to communities where their God-given gifts are valued and respected” (www.christian-horizons.org), Christian Horizons provided opportunities for meaningful work in local communities across Ontario and Saskatchewan. The Central District of the organization encompassed the geographic regions of Toronto, York, and Simcoe in Ontario.

In the Central District, the number of internal applications for PM positions declined significantly between 2019 and 2022. In a district workforce of over three hundred DSPs, almost none appeared interested in advancing to vacant leadership roles in 2022. The shortage of applicants represented a post-pandemic succession crisis for the district that threatened the quality of support provision and the achievement of strategic outcomes. Joy Wilson, an Area Manager with the organization, investigated the succession challenges in the Central District and prepared to provide recommendations to the CEO and senior leadership at their spring meeting.

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KEEPING THE WHEELS TURNING

Zachary Hubbs (student author), University of South Florida

Case Objectives and Use

This case deals with topics of leadership, training, motivation, and organizational outcomes, particularly in light of the great resignation. It is primarily designed for an MBA or EMBA course on organizational behaviour, strategic management, or leadership. It is also applicable to graduate coursework in engineering, human resources, law, and physician leadership.

After working through this case students should be able to:

- Articulate factors and challenges related to recruitment, training, motivation, and retention of skilled workers in the great resignation era.
- Differentiate between short-term strategies to treat symptomatic factors and long-term strategies to fix underlying chronic factors.
- Consider the positive and negative aspects of leadership changes on a failing team.
- Recommend and defend a leadership style that may produce the desired outcomes in high demand, mission critical environments.
- Evaluate the role of communication, processes, and technology to solve complex logistical problems.
- Consider how managers should act in a way that is both fair and just toward subordinates within the framework of legal, ethical, and stewardship factors.
- Create a framework for how to maximize return on employee pay and benefits.

Case Synopsis

In February of 2023, Marc Mastroberardino, the new dispatcher for a construction materials distribution and delivery company is struggling to fulfill delivery commitments due to challenges related to leading his team of drivers. This case explores the difficulties and complexity of recruitment, training, motivation, and retention of skilled workers in high stress environments during the “great resignation” era. Students have an opportunity to consider the methods and pitfalls of competing motivation and leadership strategies. In addition, this case allows opportunities to consider contributing factors, such as family business cultures, leadership voids, communication, workflow processes, and technologies to solve the problem.

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NEZA AT CROSSROADS: A WORKING MOTHER'S DILEMMA

Belinda Nwosu, Lagos Business School
Segun Jones, Lagos Business School

Case Objectives and Use

This case study can be used in Organisational Behaviour and Strategy courses on MBA and executive programmes. Specific topic areas include work-life integration, work-life balance, and decision-making in contexts such as women in the workplace, and Sub-Saharan Africa. The issues addressed in this case relate to the challenge of integrating professional or personal demands. Case users will gain insights into the complexity of factors that lead to decision-making for working mothers.

Case Synopsis

Neza is the head miller at Ibigori Ltd., Rwanda's largest producer of fine maize products. She has had a successful career and grown through the ranks while balancing life as a wife and a mother of three young children. In 2022, her company sent her an offer to attend a course in Nairobi, Kenya, that would involve being away for 12 months. Attending this course would help upskill her as a head miller. The decision to attend the course or not was Neza's to make, but it was a difficult one. Her eldest child had remonstrated with her for being unavailable to them as much as they would have liked. Neza needed to decide soon as the application deadline for the course was fast approaching.

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ISMAIL IS IN NOYABRSK

Malak Attia, Sheridan College

Case Objectives and Use

When international students arrive to Canada, they feel excited and happy. Then the curve starts to go down because of many reasons as: the weather is cold for approximately 10 months a year, home sickness, cooking by themselves, laundry, staying with other people who they first meet, the education system in Canada is different than their home country, they came with finding a job is an objective for financial aid. Most of international students already graduated from respectable universities, some of them have masters and I had two students with Ph.D.

What international students need to understand is; this is the culture shock curve, and it is totally normal to feel this way and for the curve to go down. This is not an individual incident, this is an incident for all newcomers and immigrants to any country, not specifically Canada. Type of student targeted are undergrad, MBA and executive MBA. For courses like: Leadership, Project Management Leadership, Decision Making and Organizational Behaviour. Issues addressed in this case are Culture Shock, Emotional Intelligence, Conflict Management, Decision-Making and Organizational Behaviour. Insights or skills will students develop as a result of preparing and discussing this case: Self-Awareness, Decision Making, Culture Shock Curve and Emotional Intelligent.

Case Synopsis

This case started in Winter of 2007. The case protagonist is Ismail. Ismail is from Kenya and his new post is in Noyabrsk-Siberia. Ismail is a senior manager in a multinational organization. After his arrival to Noyabrsk by few days, Ismail started to feel anxious, overwhelmed, depressed, and frustrated. These emotions are heightened as each day passes. Ismail must decide; either to stay or to leave. Each decision has its pros and cons, and this decision must be made urgently.

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TOO GOOD TO BE TRUE! PAID PARENTAL LEAVE FOR 5 YEARS

Jasmin Lin, Robert Morris University
Holly Chiu, Brooklyn College of City University of New York

Case Objectives and Use

This case would be appropriate for a course in Human Resource Management, Organizational Behavior, or Gender, Family, and Work, especially with the topic of Employment Rights/Legal Protections (in HR), and/or Justice and Ethics (in OB).

After completing this case, students were able to

1. (LO1) Explain how parental leave help improve work-life balance (by minimizing role conflict)
2. (LO2) Identify issues employees and managers might encounter during employees' taking maternity leave or parental leave. Especially job security, and job reassignment/rearrangement.
3. (LO3) Differentiate between procedure justice and distributive justice.
4. (LO4) Evaluate work ethics using the four-component model of ethical decision-making.

Case Synopsis

Mrs. Hsu was the Deputy Director of the National Taxation Bureau's Nantou County Branch in Taiwan. In May 2021, she received Mrs. Chiang's request to resume work after her leave in August 2017. Mrs. Chiang took many years of paid and unpaid paternity leave. In total, she took 5 years off to be with her two children. This started to put pressure on her coworkers to do her work or find someone temporary to cover for her. They could not fire her because what she was doing was legal and she had job security due to her government position. To everyone's surprise, Mrs. Chiang got a Covid vaccine on her first day returning to the office and filed for another leave in the afternoon. Her coworkers accused her of taking advantage of the system to get qualified for early COVID vaccinations and other benefits at work because of her active frontline worker status. Mrs. Hsu reviewed Mrs. Chiang's employment records and wondered what she should do regarding Mrs. Chiang's new request for another parental leave.

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ONE, TWO, THREE: LEADERSHIP AT THE RIJKSMUSEUM

Karen E. Boroff, Seton Hall University
Anne-Marie Gilis, KU Leuven; ICOM

Case Objectives and Use

This case is appropriate for several courses. At the graduate level, this case can nest nicely when course content centers on leadership and succession planning, typically in MBA or executive level settings. Coursework on talent management will find the case usable, as well, since students will have to grapple on how to plan for the next level of leadership. The case is also appropriate when the same topics are discussed in nonprofit coursework, and especially in museum management degree programs. Instructors in upper-level undergraduate courses will be able to study these same topics, provided the undergraduates already have the foundations in organizational structure and executive leadership.

Case Synopsis

Raymond de Jong, the head of Human Resources at the world-famous Rijksmuseum in the Netherlands, had to recommend to the museum's Supervisory Board for its fall 2023 meeting an executive leadership organizational structure and succession planning proposal for the museum. As the case facts unfold, readers learn that the museum has had several leadership structures, from one executive director, to two (dual leadership), then to three (tripartite leadership), and back to two, and then three again from the period 1995 to 2023. The hierarchical rank and voting power of these directors changed, as well. While the museum had grown in stature and reputation, de Jong wondered whether the current structure was sustainable. He saw operational silos at the museum. The staff of over 700 people were not unified on the mission of the museum and low-level friction among them is ignored or overlooked. He was concerned about succession planning for the three top directors, and especially the museum collection director.

As students study the case, they ponder the wisdom of dual and tripartite executive leadership for this organization, examining the benefits and costs. They consider the going-forward competencies they believe are important for future leadership.

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RETAINING AN ETHIC OF CARE: SAFE HAVEN PROPERTY MANAGEMENT INC.

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

Case Objectives and Use

This case is targeted at students in undergraduate or MBA courses in Strategic Human Resource Management, Leadership, Business Ethics, Social Entrepreneurship, and Non-profit Management. This case, based on a large Social Enterprise (SE) in Central City (anonymized pending permission), Canada, illustrates the need for organizations to ensure that plans are in place to retain and develop the critical skills they need for business continuity and success. It also demonstrates the complexity of HR practices in general and succession planning specifically in a hybrid organization such as an SE. It builds on theory of hybrids and social-mission focused organizations to show how important a normative framework is for hybrids. Without an Ethic of Care (EOC), theory argues that SEs are more likely to drift away from their social mission. The case provides an opportunity for students to see values in action through an organization's HR practice choices.

After discussing and analyzing this case, students will be able to understand social enterprise business models and the tensions these models create for HRM. They will also be able to identify appropriate steps in succession planning and be able to differentiate and apply different values frameworks that underly HR practices in organizations.

Case Synopsis

Safe Haven Property Management Inc. (SHPMI) had successfully delivered on its social mission, creating a funding stream for its parent organization, SHWRS, and creating employment opportunities for its target population, people with lived experience of homelessness, drug addiction, sexual abuse and marginalization. Its continued commercial success was critical to its ability to continue creating social value, and that, in turn, was dependent on ensuring it had the core Property Management (PM) and financial skills it needed.

The case outlines SHPMI's mission, its history and how it has forged a very different path in the PM industry. It shows how SHPMI's social mission, rather than being a weakness to overcome, was actually a strength from the point of view of both retaining senior skilled staff and competing for customers. The case detail demonstrates, through SHPMI's HR practices, how it operationalized an ethic of care in its management of people. SHPMI lacked a long-term succession plan, however. Ensuring continued development and readiness of core skills was one of its most pressing HR-related business risks. Marit Anishna, SHPMI's Executive Director of HR, was faced with the challenge of creating a succession plan that mitigated this risk but had to ensure that its leadership planning included the ethic of care that had made SHPMI so successful to that point.

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ALPHABET, INC.: TO DEI OR NOT TO DEI

Malay Krishna, SPJIMR
Sarabjeet Dhody Natesan, Krea University

Case Objectives and Use

This case was designed for use in an elective course on organizational behavior and leadership, but can also be used in a core course related to leading teams and organizations. Within such a course, the case can be positioned in a module related to “Valuing Diversity”. The case was designed for use in a master’s level program, but could also be used in a senior undergraduate class.

This case helps students identify and assess sustainable business models. After working through the case and assignment questions, the students will be able to:

- Analyze a company’s DEI’s issues using the 5-stage DEI maturity model.
- Identify options to mitigate the DEI challenges facing the company.
- Prioritize actions to improve the DEI maturity in a company.

Case Synopsis

This case outlines the challenges related to Diversity, Inclusion and Equity (DEI) facing Alphabet, a Fremont California USA-based technology giant in March of 2023. The CEO Sundar Pichai had promised a better working environment in 2018, when more than 10,000 employees globally had staged a walkout. Despite improved transparency, in the form of an annual DEI report published by Alphabet, many troubling issues remained. Last year, Alphabet had had to settle several lawsuits alleging workplace discrimination and harassment. In 2023, Alphabet also faced challenges to its core business model, with the advent of generative AI such as ChatGPT. How should Pichai prioritize the DEI challenge? As one AI expert put it - the two challenges were linked because a non-inclusive workforce could translate into a non-inclusive and biased AI. So, what should Pichai do?

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Social Impact and Sustainability Cases

Track Chair: María Ballesteros-Sola, California State University Channel Islands

Session Chair: María Ballesteros-Sola

Cases

Authors

Caring Caps for Cancer: Building a Community of Knitters

Sheri Lambert
Sara Honovich

Mayor Muñoz's Grand Challenge: The Acho Bullring Controversy

Vijaya Zinnoury
Remy Balarezo
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Development of Agri-Entrepreneurs: The Road ahead for Syngenta Foundation India

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South Africa's Solidarity Fund: Navigating the Shores of Uncertainty and Crisis

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Social Venturing in Guatemala: The Case of Restaurante Chichoy - Post Pandemic

Claire Dallies
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Twenty20 Kizhakkambalam: A Corporate Local Governance Experiment in Southern India

Nidheesh Joseph

CARING CAPS: A COMMUNITY OF KNITTERS

Sara Honovich, Temple University
Sheri L. Lambert, Temple University

Case Objective and Use

This case is suitable for social impact and nonprofit management courses that emphasize growth and expansion strategies, 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:

- identify the core competence of the business;
- identify the stakeholders of an organization’s ecosystem;
- identify and understand the opportunities and challenges for social impact in an organization based entirely on volunteers;
- understand the value of a differentiation strategy to a nonprofit; and
- apply strategy concepts to create and grow awareness and engagement, determine a way to organize and manage the program, and importantly, make a difference in peoples’ lives.

After analyzing this case, students will be better equipped to have extended detailed conversations about social impact and social entrepreneurship management options.

Case Synopsis

Caring Caps, a small-scaled nonprofit organization, was considering ways that it could further positively impact the lives of cancer patients. Unlike the many nonprofits who focus on medical research to find a cure for cancer, Caring Caps was dedicated to patients and their caregivers, helping them be more comfortable as they underwent cancer treatment protocols. Caring Caps also was unique as a grass-root only non-profit.

Providing sources for physical comfort and emotional support into a cancer patient’s recovery plan was a common practice, but adding a constant stream of knitted caps was novel. Preliminary research showed that “chemo caps” played an important part of the recovery process for a cancer patient. It goes far beyond covering a newly-bald head. Jane Bloom, Caring Caps founder and registered nurse, was looking for answers. “How did I get this far? How can I get Caring Caps to grow beyond New Jersey, New York and Pennsylvania? How can it solicit more help from more people, more hospitals?” She knew that she must build awareness of the organization, but how exactly? What does she need to do?

The case authors developed this case for class discussion rather than illustrate either effective or ineffective handling of the situation. The case, instructor manual, and synopsis were anonymously peer reviewed for presentation at the NACRA 2023 Conference. © 2023 by Sara Honovich and Sheri Lambert. Contact persons: Sara Honovich, Fox School of Business, 1801 N. Liacouras Walk, Philadelphia, PA, 19122, +1(609) 828-1857, sara.honovich@temple.edu , and Sheri L. Lambert, Fox School of Business, Temple University, 1801 N. Liacouras Walk, Philadelphia, PA 19122, +1(610) 563-1059, sheri.lambert@temple.edu .

MAYOR MUÑOZ'S GRAND CHALLENGE: THE ACHO BULLRING CONTROVERSY

Remy Balarezo, Universidad de Piuria (UDEP) - Campus Piuria, Peru
 Vijaya Zinnoury, University of Denver, USA
 Paul Corcuera, Universidad de Piuria (UDEP) - Campus Piuria, Peru
 Renzo Garcia, Universidad de Piuria (UDEP) - Campus Piuria, Peru
 Verushka Gutierrez (Research assistant), Universidad de Piuria (UDEP) - Campus Piuria, Peru

Case Objectives and Use

This case is appropriate for use in MBA and undergraduate introductory courses in:

- Sustainability & Social Impact as well as
- The Sustainability modules in:
 - Global Management
 - Strategic Management

Issues addressed in this case are homelessness and how to address it from a multi-stakeholder perspective.

In this decision-oriented case, students have the unique opportunity to understand the genesis of homelessness, engage in a discussion of the challenges involved, and tackle the problem from a multi-stakeholder perspective by stepping into the shoes of the two protagonists, i.e., Muñoz and Ackermann, as they confront the challenge of how and where to house and quarantine homeless people in Lima, Peru at the beginning of the onslaught of Covid 19 in March 2020.

Case Synopsis

On March 22, 2020, a controversy erupts as Jorge Muñoz (Mayor of Lima) announces on TV that the Acho Bullring in Lima, Peru would be used as a temporary shelter for quarantining the homeless people of Lima. Mayor Muñoz and Willy Ackermann (President of the Lima Charity) faced the decision of whether implementing a temporary shelter for homeless people at the Acho Bullring in Lima, was a viable option considering the controversy and opposition it had sparked in the community among the venue's current tenants and bullfighting enthusiasts. This case delves into homelessness, a grand challenge facing all nations today and embedded in the United Nations' Sustainable Development Goals (UN SDGs).

The main objective of this case is to engage students in understanding and addressing a significant global issue, i.e., homelessness, which is often approached primarily from a philanthropic standpoint but necessitates a professional perspective.

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 2023 Conference, San Antonio, Texas, USA, October 5-7, 2023. © 2023 by Balarezo, Zinnoury, Corcuera, Garcia, and Gutierrez. Contact person: Vijaya Zinnoury, University of Denver, Daniels College of Business, Denver, CO 80208; e-mail: Vijaya.Zinnoury@du.edu; Tel: 720-227-1864.

BAJÍO SUNGLASSES: THE SUSTAINABLE PACKAGING DECISION

Ram Subramanian, Stetson University
Michelle DeMoss, Stetson University

Case Objectives and Use

This case is suitable for an undergraduate or MBA course on strategic management. The suggestion is to use this case early on in the course for the primary reason of establishing the competing forces (financial and environmental) that typically come into play in strategic decisions. The assumption is that students would have been exposed to topics such as corporate social responsibility, sustainability, and the triple bottom line prior to the case discussion. After reading, analyzing, and discussing the case, students should be able to:

LO#1: Understand the role of sustainability in business decisions.

LO# 2: Analyze the environmental and financial implications of a decision.

LO# 3: Evaluate choices using established decision criteria to make a recommendation.

Case Synopsis

In January 2022, Al Perkinson, the founder and CEO of the New Smyrna Beach, Florida-based Bajío Sunglasses, faced a packaging decision. Founded with a mission to promote sustainability, Bajío was using vegetable-tanned cow leather sourced from China for its product packaging. Covid-19-related shipping issues had caused the packaging cost to rise sharply as well as causing delays that were adversely affecting the company's policy of filling retailer orders within a 24-hour period. Bajío's packaging consultant had identified a commercial manufacturer of cactus leather in Guadalajara, Mexico that appeared promising. However, cactus leather was an unproven raw material for packaging in addition to the risk that Bajío faced by depending on a product that had just one supplier. With anticipated increased shipping costs in the near term, Perkinson had to make a decision that had an impact on both Bajío's bottom line and its sustainability credentials.

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DEVELOPMENT OF AGRI-ENTREPRENEURS: THE ROAD AHEAD FOR SYNGENTA FOUNDATION INDIA

Sushmita Srivastava, SP Jain Institute of Management and Research, Mumbai
Akansha Misra, SP Jain Institute of Management and Research, Mumbai

Case Objectives and Use

The case can be taught in elective courses on Sustainable HR Development or in dedicated courses on Agri Business Management, Social Entrepreneurship, Agri-entrepreneurship to further an understanding of how to develop entrepreneurs in the agricultural sector for poverty reduction amongst small and marginal farmers in the country. The case can also be used in courses dealing with scalability and sustainability of Agri-entrepreneurship training programs, that may influence thinking on Public Policy.

In the context of AE development , the case addresses issues such as a) challenges and opportunities of Agri entrepreneurship development landscape in a developing economy, b) factors that should be taken into consideration for funders participation in Agri Entrepreneurship Development , c) need for funding support towards aligning training objective with training content, design and delivery as well as mentorship support, d) transfer of learning from training and mentorship activities towards achieving the end goals, e) factors that may facilitate or inhibit the scaling up of Agri-entrepreneurship development program.

Case Synopsis

Agri Entrepreneurship Growth Foundation (AEGF) is the implementation arm of Syngenta Foundation India (SFI). SFI, along with NGOs and other associations helps marginalized farmers to access improved production technologies to increase income and boost productivity. Mr Pankaj Shukla COO is responsible for training 100,000 lakh eligible farmers as Agri- Entrepreneurs (AEs) by 2030, up from the present level of 12,000 farmers (in June 2023). The vision of SFI is to be able to impact 10% of the total Small and marginal farmers base in India.

Mr Pankaj Shukla is confident that with the current capacity of training 1000 AEs per month, available donor support, existing training curriculum and mentorship, the above target is much within reach in 7 years' time. However, in a recent engagement with the funding partner, there was a challenge of retraining AEs and attrition amongst mentors, and their redeployment in other projects as well as increased idle time of trainers due to funding arrangements. Mr Pankaj Shukla feels that although focusing on achieving the target of number of AEs trained is important in the short run; one cannot lose sight of quality of the AEs selected that is facilitated through the Mentoring initiatives by the Agri-entrepreneurship mentors. Attaining the balance between quality and quantity of Agri entrepreneurs would have implications for the goal of sustainable livelihood of the farmers, in the long run.

Where should AEGF focus on? Should it focus on funders support for Agri Entrepreneurial Development that covers the end to end process of AE development or focus on AE training alone through non-funded partnerships? Which of these alternative would result in lower drop outs amongst AEs, AEMs and Trainers and thereby more robust Agri Entrepreneurial Development?

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 2023 Conference, San Antonio, Texas, USA, October 5-7, 2023. © 2023 by Sushmita Srivastava and Akansha Misra. Contact person: Sushmita Srivastava, SPJIMR, Bhavan's Campus, Andheri West, Mumbai 400058, +91 9930451952, sushmita.srivastava@spjimr.org .

SOUTH AFRICA'S SOLIDARITY FUND: NAVIGATING THE SHORES OF UNCERTAINTY AND CRISIS

Keratiloe Mogotsi, University of the Witwatersrand, South Africa
 Clare Mitchell, University of the Witwatersrand, South Africa
 Claire Beswick (faculty supervisor), University of the Witwatersrand, South Africa

Case Objectives and Use

The case study is suitable for multiple disciplines and for postgraduate studies. It can be utilised for students in the fields of project management, philanthropy, management, development and non-profit studies and social innovations during crisis in Africa where management, responses, roles and collaborations of philanthropy is studied in the face of crisis, adversity and uncertainty. Typically, this would include postgraduate diploma students, project management students, Master of Management and Master of Business Administration (MBA) students. The case study is also suitable for short courses offered to middle and senior managers and executives as part of an executive education offering.

Learning Outcomes

- Compare and contrast agile project management versus traditional project management in the context of a non-profit organisation during crisis periods;
- Assess the role and contribution of philanthropy during crisis periods;
- Evaluate the phases of unconventional project management as executed by the Solidarity Fund;
- Rate the value addition and contributions of agile approaches in philanthropy, and;
- Summarize the impact of the work done by the Solidarity Fund using the approach that they did albeit unintentionally.

Case Synopsis

It was December 2020, a year that had seen the world lock down in the face of the Covid-19 pandemic. The Solidarity Fund (the Fund) had been in existence for nine months, and its chair, Gloria Serobe (a well-respected businesswoman best known as a co-founder of Women Investment Portfolio Holdings), sat in her study at her Johannesburg home, that had now become her office, and thought about South Africa's vaccination programme. Amidst so much uncertainty, two facts were clear: firstly, that the country urgently needed vaccines to save lives, and secondly, that having procured the vaccines, it urgently needed to get those vaccines into the arms of as many South Africans as possible. Government had made it clear that it was going to procure the vaccines and lead the vaccine rollout, which left Serobe deep in thought about what supporting role the Fund could play. What strengths could it draw on to have the most catalytic impact in helping government roll out its vaccine programme?

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 2023 Conference, San Antonio, Texas, USA, October 5-7, 2023. © 2023 by Mogotsi, Mitchell and Beswick. Contact person: Keratiloe Mogotsi, University of the Witwatersrand, Wits Business School 2 St Davids Place Parktown, +27117173200, bksmabuzane@gmail.com.

SOCIAL VENTURING IN GUATEMALA: THE CASE OF RESTAURANTE CHICHOY – POST PANDEMIC

Claire Dallies, Universidad del Valle de Guatemala
Yolanda Sarason, Colorado State University (faculty supervisor)
Laura Robey, Colorado State University (student author)

Case Objectives and Use

The case will be appropriate for an undergraduate or graduate level strategic management and/or entrepreneurship class. It is particularly appropriate for a course or section focusing on social venturing or sustainability. After analyzing the case, students should be able to analyze the cultural, political, economic and historical context for a social venture in an emerging economy. They also should be able to describe how a social venture is different from an economically focused venture and identify sources of competitive advantage for the social venture. Another focus of the case is the relationship between a culture of resilience and sustainability. Students will make a strategic recommendation that demonstrates their understanding of how a social enterprise can excel through an external shock that is consistent and builds upon their competitive advantage.

Case Synopsis

The case is set at the beginning of the pandemic. The protagonist has visited one of the two famous restaurants about 40-60 miles from Guatemala City. The restaurants are owned and managed by a Mayan family and are known for their regional foods such as chicken soup, chorizo, specialized sausage and unique fruit pies. They are also known for being called the ‘widows café’ during the Guatemalan civil war over fifty years ago and were able to provide income for more than seventy-two widows of the war.

The protagonist had brought journalists to the restaurant as part of her tourism program at a university in Guatemala. While they were eating, she discovered that the bus transporting them had gotten stuck. She witnessed a Mayan woman come out of the restaurant and orchestrate having the bus pulled out of the mud. The protagonist contemplates the remarkable event and the unique history and culture of the restaurants. The case then focuses on the history of the restaurant and potential sources of competitive advantage. The question to be answered is how the restaurant will deal with the impending pandemic given that it will be shut down and knowing that the tourism industry will be dramatically impacted while the pandemic persists, and perhaps longer. A short history of Guatemala is provided at the end of the case as well as links to the history of Guatemala and Restaurante Chichoy.

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 2023 Conference, San Antonio, Texas, USA, October 5-7, 2023. © 2023 by Dallies, Sarason & Robey. Contact person: Claire Dallies, Universidad del Valle de Guatemala, 2364-0494 ext 21384, cdallies@uvg.edu.gt.

TWENTY20 KIZHAKKAMBALAM: A CORPORATE LOCAL GOVERNANCE EXPERIMENT IN SOUTHERN INDIA

Nidheesh Joseph, Indian Institute of Management Tiruchirappalli

Case Objectives and Use

The case is suitable for teaching multiple facets of CSR like its ambit, its boundaries, its political dimensions. It can be used for teaching political CSR, the difference in handling political CSR as a social responsibility versus a social business which is the forte of corporates. The case can also be used for teaching the intended and unintended consequences of CSR to graduate level courses on CSR, Social Entrepreneurship and Sustainability. The case is equally suitable for participants with and without prior work-experience in both MBA and Executive MBA classes. The instructor can control the intensity of case discussion based on the level of work-experience of the participants. After discussing this case, the students will be able to:

- (1) Discuss the impact of CSR on local development
- (2) Investigate the role of corporates in local governance
- (3) Critically analyze the role of CSR in politics
- (4) Understand the challenges in Political CSR and frame recommendations

Case Synopsis

Twenty20 Kizhakkambalam is a CSR initiative by the Ann-Kitex group in central Kerala, a state in the southern part of India. Twenty20 was started to overcome the governance gap in the local village where Kitex was operating. Through its CSR fund, Kitex group contributed to mitigating social problems and providing public good for the welfare of the people. Twenty20 was always bogged with allegations from various quarters over its operating style, leadership style of its coordinator Sabu Jacob who is also the MD of the Kitex group, its environmental violations, its neo-liberal policies and developmental politics. In 2015, Twenty20 contested for the local government election and surprised everyone by winning the elections. It continued the welfare initiatives more strongly after winning the elections. In the next elections in 2020, Twenty20 was able to retain power and also extend its presence to the neighboring four local governments. Buoyed by its success, Twenty20 contested eight seats in the Kerala state elections in 2021. However it failed to win even one seat. Jacob is in turmoil over the future of Twenty20 and all that he stood for. He always faced the criticisms showcasing the popular support. Now he is in a dilemma about the future of Twenty20 and its future ambitions. The case invites students to discuss a unique case of India's first corporate panchayat (village government) and deliberate on the intended and unintended consequences of political CSR.

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 was anonymously peer reviewed for presentation at the NACRA 2023 Conference, San Antonio, Texas, USA, October 5-7, 2023. © 2023 by Nidheesh Joseph. Contact person: Nidheesh Joseph, Indian Institute of Management Tiruchirappalli, Pudukkottai Main Road, Chinna Sooriyur Village, Tiruchirappalli – 620024, +91-8086520602, nidheesh.f16001@iimtrichy.ac.in.

Strategy and Policy Cases

Track Chair: Karin Schnarr, Wilfrid Laurier University
Co-Chairs: Brent D. Beal, University of Texas at Tyler, and
 Terry McGovern, University of Wisconsin - Parkside

Table 1

Session Chair: Armand Gilinsky, Sonoma State University (emeritus)

Cases	Authors
Tesla: A Golden Goose or Lemon	Theresa Coates Vijaya Zinnoury Janet Bartholow Marilyn Taylor
Creating A More Sustainable World with Livestock Water Recycling	Brooke Klassen Stephanie Yong
Cars 24: Innovating to Drive Growth	Bindu Kulkarni Vasant Sivaraman Parag Agrawal
Facebook and the Future of Instagram Kids	Scott Sherman Randall Harris Anne Lawrence
Rocket Carwash: Rocket Clean, Speedy Quick	Erin Pleggenkuhle-Miles Samuel McDermott Leif Lundmark Steve Schulz Erin Bass
A Transformative Path for a Co-Operative Industry Association	Daphne Rixon Fiona Duguid Brad Long
Sling Aircraft: Gearing up for the Big Time	McEdward Muriimbika Amanda Bowen Claire Beswick

Table 2**Session Chair:** Brent Beal, University of Texas at Tyler**Cases****Authors**

T.I.A.A.: Breaking New Ground

Marlene Reed
Eric SwanWiping Away Unemployment: East Texas Lighthouse for the Blind's
Search for SustainabilityBrent Beal
Megan Aragon
Indira KarimovaDeer Lake Regional Airport Authority: Making Connections and
Reaching New HeightsJulie Pitcher Giles
William Newell
Janice Ryan

Southwest Airlines

Marlene Reed
Rochelle Brunson

Meadowbrook at Clayton: Is it a Hidden Gem?

Oi Lin Cheung
Shari Fowler
LaCalvince Simpson

TESLA: A GOLDEN GOOSE OR LEMON?

Theresa Coates, Limestone University
Vijaya Zinnoury, University of Denver
Janet L. H. Bartholow, Limestone University
Marilyn Taylor, Gottlieb Chaired Professor Emerita, UMKC

Case Objectives and Use

This case is appropriate for use in graduate (MBA and Executive MBA) and undergraduate courses in *Strategic Management*.

This decision case presents the unique opportunity for students to arrive at the decision on hand through a multi-dimensional assessment of Tesla's risk profile by integrating concepts from corporate governance, financial performance, and market performance.

Case Synopsis

The case focuses on the decision point of Ari Klotas, a young hedge fund manager who in January 2023 had to decide whether to hold, sell, or buy Tesla shares. His fund, Monarch Global Fund, had invested in Tesla in the past and made significant returns. The Associate must grapple with whether Tesla was a viable equity choice by evaluating (a) Tesla's corporate governance, (b) its financial performance, and (c) the opportunities and threats Tesla would face in the changing global electric vehicle (EV) market. The case discusses the evolution of the board from 2018-2022, the recent strategic actions of Tesla and CEO, Elon Musk's actions with Twitter, the EV demand as well as the stock price movement between 2017-2022.

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 2023 Conference, San Antonio, Texas, USA, October 5-7, 2023. © 2023 by Coates, Zinnoury, Bartholow, and Taylor. Contact person: Vijaya Zinnoury, University of Denver, Daniels College of Business, Denver, CO 80208; e-mail: Vijaya.Zinnoury@du.edu; Tel: 720-227-1864.

CREATING A MORE SUSTAINABLE WORLD WITH LIVESTOCK WATER RECYCLING

Brooke Klassen, Edwards School of Business, University of Saskatchewan
Stephanie Yong, Sohkisiwin Solutions

Case Objectives and Use

The case asks students to study a growing agricultural technology company that needs to determine an appropriate expansion strategy that aligns with their resources and capabilities and takes advantage of opportunities in the marketplace. Students will learn about different facets of strategic analysis, international expansion, decision making, and topical business issues including:

1. Analyzing a company's internal and external environment;
2. Determining a company's source of competitive advantage;
3. Identifying and evaluating a company's opportunities for international expansion;
4. Making a recommendation regarding appropriate courses of action;
5. Identifying how a company's strategy is linked to sustainability (optional); and
6. Examining the challenges faced by women working in a male dominated industry (optional).

This case is suitable for use in senior undergraduate-level courses in strategic decision making, global/international business, agriculture, sustainable business or environmental studies. It can be used to help students complete environmental analysis (using PESTEL, Porter's Five Forces and SWOT analyses), determine sources of competitive advantage (using VRIO analysis), evaluate international expansion options (using the Uppsala Model) and make strategic recommendations decisions. It could also be used as a platform for discussion around sustainable development and/or gender equity.

Case Synopsis

Karen Schuett started Livestock Water Recycling (LWR) because she recognized the important role that water management would play in creating a more sustainable world. Combining passions in agriculture and water reclamation, she had built the Calgary-based company by establishing a solid foothold in the Western Canadian agriculture market. By securing venture capital funding, she had been able to expand quickly to meet the growing demand for sustainable farming. However, Schuett concluded that exponential growth would only happen if the company expanded their customer base in international markets. She could envision several different ways of expanding internationally in 2022 but was unsure which option(s) would best meet the needs of customers while maintaining LWR's reputation as the world's leading provider of manure treatment technology.

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CARS24: INNOVATING TO DRIVE GROWTH

Bindu Kulkarni, S.P. Jain Institute of Management & Research
Vasant Sivaraman, S.P. Jain Institute of Management & Research
Parag Agrawal (student author)

Case Objectives and Use

The case aims to introduce concepts of the Blue Ocean Strategy to MBA participants. The frameworks include the six paths, tiers of noncustomers, buyer utility map, the four-action framework, value curve, and market-creating strategies. The case can be used as a stand-alone module in a strategy course or as a capstone case in a blue-ocean strategy course. The case discusses the offering of Cars24 in creating a nondisruptive marketplace through a reconstructionist approach. Technology as an enabler in Blue Ocean Strategy execution and how a firm can keep expanding market boundaries when the ocean becomes RED are other discussions built in the case, making it a holistic blue ocean strategy case.

Case Synopsis

The case is on Cars24, a used car industry entrant who unlocked demand and by 2022 became an industry leader with a blend of disruptive and nondisruptive growth. Cars24 was founded by Vikram Chopra (CEO), Mehul Agrawal (COO), Ruchit Agarwal (CFO), and Gajendra Jangid (CMO) in 2015 when India had a low motorization level. The used car industry was fragmented. The organized sector was just 12% of the total market. Buyers could purchase used cars from a dealer with value-added services like car ownership paper transfer, finance, and insurance or from a known person. Indian used car market was supply-constrained, and existing dealers put up with this problem. Cars24 had realized this difficulty, so when they entered the industry, their first move was to handle the supply side of the business. They aimed to secure the supply of cars to build a robust business model- a key strategic move. They partnered with organized/ semi-organized dealers, original equipment manufacturers, corporates, leasing companies, and car rental firms to grow their business. By the end of FY19, Cars24 had the most extensive network for used cars in India. In 2020, it entered the Unicorn Club. Their next strategic move was to convert buying and selling of used cars into an online retail business as the demand for personal mobility increased. It seized this new opportunity to expand market boundaries by selling used cars online. Their results for 2022 reported revenue from operations at INR 51 billion. In 2023 the founders needed to address issues like reducing cash burn and making the business financially sustainable. Continuing to increase the scale of operations, strengthen cash generation, and finally move closer to registering profits were on the founders' agenda. As the case closes, the founders return to the drawing board to consider new strategic moves toward profitability.

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FACEBOOK AND THE FUTURE OF INSTAGRAM KIDS

Randall D. Harris, Texas A&M University-Corpus Christi
 Anne T. Lawrence, San José State University
 W. Scott Sherman, Texas A&M University-Corpus Christi
 (Authors are listed alphabetically by last name)

Case Objectives and Use

This case was designed with two different uses in mind: (1) in a module on corporate social responsibility in an undergraduate strategic management course, or (2) as an integrative case in an undergraduate course in business, government, and society, where it would enable a broad discussion of several themes, including stakeholder theory, the social impact of technology, whistleblowing, government regulation, and consumer safety and privacy. The case may be used to illustrate the tension between an organization’s sometimes conflicting obligations to its shareholders and its broader range of market and nonmarket stakeholders. The case may also be used to generate and evaluate options for responding to public criticism from influential nonmarket stakeholders.

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

- Define the key strategic issues, both internal and external. (Learning Objective 1).
- Evaluate the financial condition of the company. (Learning Objective 2).
- Compare and contrast the interests and power of shareholders to other company stakeholders (Learning Objective 3).
- Generate options for management. (Learning Objective 4).
- Evaluate and defend a course of action for the company. (Learning Objective 5).

Case Synopsis

It was October 25, 2021, and Facebook CEO Zuckerberg faced a crucial dilemma for his company. What to do about Instagram Kids? Just weeks before, on September 25th, 2021, the company had announced the “pause” of development for the Instagram Kids application within the Facebook company. Instagram Kids was under development as an Instagram experience for children under the age of thirteen. Work on the application was halted abruptly after a former Facebook employee publicly released Facebook internal documents and research alleging Instagram Kids might be harmful to children and teenagers.

What should Zuckerberg do? Should Zuckerberg cancel the Instagram Kids project, and concede the loss of young social media users to the competition? Or should Facebook proceed with Instagram Kids, shoring up a critical part of the company’s product portfolio? What steps should Facebook take to protect vulnerable teens if it proceeds with Instagram Kids? Did other options exist for Zuckerberg to consider? What was the way forward for Facebook and Instagram Kids?

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ROCKET CARWASH: ROCKET CLEAN, SPEEDY QUICK

Sam McDermott, University of Nebraska at Omaha (student author)
 Erin Pleggenkuhle-Miles, University of Nebraska at Omaha (faculty supervisor)
 Steve Schulz, University of Nebraska at Omaha
 Leif Lundmark, University of Nebraska at Omaha
 Erin Bass, University of Nebraska at Omaha

Case Objectives and Use

This case examines a company in an industry that is growing through consolidation and market saturation. The carwash industry is highly competitive. With its visible services and imitable offerings, differentiation is challenging. This case is particularly effective in a Strategic Management course and can be utilized to teach external and/or internal analysis as well as business level strategy (positioning). It can be used effectively in an undergraduate or graduate class and can be used as an open or closed case.

Students can use a PEST(EL) analysis to identify how different macroenvironmental trends are impacting this industry and what implications they might present for the company. For example, water restrictions due to draught mean that water reclamation technology will likely become a focus in the near future. Car washes rely on disposable income, so economic implications directly impact this industry as well. While this speaks to challenges the industry will have to overcome, students can also delve into a competitor analysis and will quickly determine that it is very difficult to differentiate in this industry. In teaching this case, you can have students spend time conducting an internal analysis and/or have them utilize blue ocean frameworks such as a strategy canvas to help identify value curves. The ERRC (eliminate-reduce-raise-create) Grid is another tool students can apply to begin thinking about how they might help Rocket Carwash better position for the future. Overall, the value of this case is that it an industry that students can readily grasp, but one that provides enough nuances that make for interesting analysis and discussion. This case has interviews with the protagonist that extend the material.

Case Synopsis

With carwashes seemingly popping up on every corner, the car wash industry seemed to have found new growth. Headquartered in Omaha, Nebraska, Rocket Carwash was one of the companies that was expanding rapidly right as the Pandemic hit. Though growth slowed during the Pandemic, this case focuses on how Rocket tries to differentiate from its competitors, the environmental trends impacting the industry, and more intense competition as the industry consolidates. This case was written in February 2023 and was based on interviews conducted with Conrad Sams, the Vice President of Rocket Carwash. Sams was one of the original founders of Rocket and is passionate about the industry and his company. Having spent many years managing a carwash, he believes the customer experience at Rocket sets them apart from the competition. However, as competition grows more intense, the question remains whether that perceived value of the customer experience is truly a competitive advantage or if there are other potential ways forward for Rocket.

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 2023 Conference, San Antonio, Texas, USA, October 5-7, 2023. © 2023 by Erin Pleggenkuhle-Miles and co-authors. Contact person: Erin Pleggenkuhle-Miles, University of Nebraska at Omaha, 6708 Pine Street, Mammel Hall 303, 402.554.2744, erinpmiles@unomaha.edu .

A TRANSFORMATIVE PATH FOR A CO-OPERATIVE INDUSTRY ASSOCIATION

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Case Objectives and Use

This case is intended primarily for use by upper year undergraduate students of strategic management, and it will appeal to instructors seeking a non-corporate context in which to review the strategic management process. The case would also be valuable for graduate or upper-year undergraduate students focusing on the development and management of co-operative organizations. Student learning objectives of this case are:

1. To gain insight into the co-operative model and the work that the Newfoundland and Labrador Federation of Co-operatives is doing to support the development of co-operatives and credit unions in the province of Newfoundland and Labrador.
2. To consider ways of scaling that support to achieve growth in the co-operative sector and promote the Federation amongst existing co-operatives to increase membership in this voluntary association.
3. To identify strategic initiatives and develop an implementation plan that will help the Newfoundland and Labrador Federation of Co-operatives to achieve its stated goals while considering the financial and human resource implications of those proposed activities.

Case Synopsis

The Newfoundland and Labrador Federation of Co-operatives is an industry association that represents co-operatives and credit unions in the Canadian province of Newfoundland and Labrador. Dave Walsh, the new Managing Director of the Federation is presented with numerous opportunities to grow the organization and the co-operative sector in the province, but with modest resources available has to be strategic in plotting the way forward. Aided by a newly developed (November 2022), Board-approved strategic plan in which key priorities and objectives have been identified, the Managing Director now must implement that plan and identify the right set of initiatives along with their relative priority, resource requirements and timeframe for implementation. This case allows students to deepen their familiarity with the strategic planning process while learning more about the co-operative model, ways of achieving growth in the co-operative sector of a region, and the role of an industry association in representing its members.

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SLING AIRCRAFT: GEARING UP FOR THE BIG TIME

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Case Objectives and Use

This case is as much strategy as about strategic entrepreneurship because its ultimate objective is to help the course facilitators to effectively engage and guide students through the key learning objectives in strategic rejuvenation and organisational competitive entrepreneurial orientation. The case is targeted at MBA and master in management classes specialising in Strategy, and Corporate Entrepreneurship. The case is based on a real company Sling Aircraft, an experimental aeroplanes (non-type certified aeroplanes) manufacturing company based in Johannesburg, in South Africa with a global market reach. This is decision-based case. Student will be asked to play the role of the founding entrepreneur and executive Mike Blyth and his business and executive partners, James, and Andrew Pitman, in the case who are faced with the decision to introduce a new product line, a certified five-seater aeroplane. This would take the company into an entirely new and more complex realm of international aviation manufacturing, marketing and distribution. The partners had to be sure to set up a new strategy for the business so that they could enter this realm and compete there successfully without jeopardising the successes the company had achieved to date.

Case Synopsis

After fifteen successful years from founding and growing Sling Aircraft, an experimental aeroplanes (non-type certified aeroplanes) manufacturing venture, in 2021, the founder Mike Blyth and his business partners, James and Andrew Pitman were facing new challenges the business had never faced before. Despite the global upheaval and economic devastations caused by the covid-19 pandemic, 2020 had been a productive year for the South African small-aircraft manufacturer. Globally, sales of Sling Aircraft's traditional experimental two-seater and four-seater, low-wing aeroplanes were on the rise. The company had just finished a development prototype of a high-wing four-seater. With this much wind in their sail, in January 2021, founder Mike Blyth and his business partners felt certain that there was space in the market for a five-seater aeroplane, and they were meeting to discuss how to set up the business for success. The strategic choices required to take the company into the new direction at first sight seemed clear and obvious, but it immediately became apparent the founder and entrepreneur Mike and fellow executive partners at Sling Aircraft faced a dilemma regarding how to set up or restructure the company for success in exploiting the new opportunity without putting all the hard work of the last 15 years in jeopardy. After all, the company was in its best shape ever since 2005 when it was founded. Building aeroplanes was in the blood of all three of Sling's partners. There was no question that they would continue to innovate and grow the business, and they were convinced that they could be very successful with a five-seater. But building one could take them into an entirely new and more complex realm, and they had to be sure to set the business up so that they could enter this realm and compete there successfully.

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T.I.A.A.: BREAKING NEW GROUND

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Case Objectives and Use

This case was developed for use in a strategic management course at the undergraduate level. The subject matter of the case would work well at the point in the course where the following topics are discussed: Evaluating a company's resources, capabilities and competitiveness and the additional subject of strategic leadership. The key conceptual foundations presented in the case are the sources of power available in an organization and the use of effective negotiation skills in coming to a consensus on a significant change in an organization's strategy.

Case Synopsis

The story of the President of one of the oldest investment organizations in the United States who was seeking a dramatic change in strategy for the company is the subject of this case. Thasunda Brown Duckett became the President of T.I.A.A. (Teachers Investment Annuity Association) in 2021. Several factors had occurred in recent months that suggested for the company to be competitive in the future, they needed to broaden the scope of organizations they served to for-profit as well as non-profit. One of those factors was the Secure 2.0 Act of 2022. This Act set up guidelines to encourage companies to be more inclusive in their offering of retirement accounts to employees, and this suggested that all retirement investment companies would have the opportunity to bring in more revenues. Therefore, Duckett would need to convince the Board of Directors at their October 2022 meeting that the future profitability of the company depended upon broadening their reach to for-profit organizations.

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WIPING AWAY BLIND UNEMPLOYMENT: EAST TEXAS LIGHTHOUSE FOR THE BLIND'S SEARCH FOR SUSTAINABILITY

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 Brent D. Beal, University of Texas at Tyler (faculty supervisor)

**Megan Aragon is currently the Technology Services Administrator at East Texas Lighthouse for the Blind*

Case Objectives and Use

This case would typically be used in a capstone strategic management course. It asks readers to consider if East Texas lighthouse for the Blind (ETLB) should begin utilizing local distributors as part of its sales strategy and, if it elects to begin using local distributors, if it should break with past practice by actively working to differentiate its products by advertising its non-profit status and its mission to serve the blind community of East Texas.

Case Synopsis

East Texas Lighthouse for the Blind (ETLB) is a 501(c)3 nonprofit organization headquartered in Tyler, Texas. Almost all of ETLB's mission-related activities are financially supported by profits from its primary business, Horizon Industries. This profit is then funneled to ETLB's Client Services, an entity that offers free rehabilitation, training, education, and employment programs to blind individuals across forty East Texas counties. Horizon purchases jumbo reels of paper directly from paper mills and then converts this paper into end-user products by trimming to size, folding, and packaging for various uses by end customers. Horizon competes in the Sanitary Paper Products Industry; industry products include diapers, incontinence products, feminine products, facial tissue, toilet paper, paper towels, and napkins.

It is January 2023, and two of the ETLB's vice presidents, Rick and Jeff, are discussing the possibility of using local distributors to help increase sales volume, and as part of that larger discussion, if the company should break with past practice by actively working to differentiate its products by advertising its non-profit status and its mission to serve the blind community of East Texas.

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DEER LAKE REGIONAL AIRPORT AUTHORITY: MAKING CONNECTIONS AND REACHING NEW HEIGHTS

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Janice Ryan, Grenfell Campus, Memorial University of Newfoundland

Case Objectives and Use

This case is well-suited to senior undergraduate or graduate-level courses in organizational theory or strategic management, or any other course that examines partnerships and interorganizational relationships.

The case is intended to challenge students to consider why organizations pursue different types of interorganizational relationships (IORs) and push them to reflect on how a greater understanding of the underlying intent of those IORs may better inform strategic decision-making and long-term planning in an organization, specifically related to decisions around what types of IORs to pursue/abandon and for what specific gain/cost.

After working through this case and associated analysis, students will be equipped to:

1. Understand and explain why organizations form and pursue interorganizational relationships (IORs).
2. Evaluate different types of IORs and how they inform strategic decision-making.
3. Discuss the intentions that underpin co-exploration and co-exploitation IOR forms and how these may shape the traits of an interorganizational relationship.

Case Synopsis

The case takes place in March 2022, and focuses on President and CEO of the Deer Lake Regional Airport Authority Inc. (DLRAA), Tammy Priddle, as she shifts away from the crisis decision-making that characterized pandemic operations to turn her attention to questions of growth for the non-profit. Armed with a new, Board-approved strategic plan that focused on the need for business development, Priddle contemplated how best to grow DLRAA's revenue streams, and she continued to return to the question of relationships. The organization was small but had significant resources and capabilities; with the right partners, Priddle was confident those could be leveraged to achieve the strategic aim for business growth. But what type of relationships should DLRAA be pursuing? Priddle realized she needed to give some thought to the type of opportunities that would be enticing to potential partners and also support the goals of DLRAA. She had some reflection and evaluation to do before she could update the Board on the best way to advance its strategic plan.

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SOUTHWEST AIRLINES: INNOVATING A COMMERCIAL AIRLINE

Rochelle R. Brunson, Baylor University
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Case Objectives and Use

This case was written for an undergraduate course in strategic management to be taught at the point in the course when the issues of strategy formulation and execution are discussed. The primary issues addressed are the driving forces in the airline industry, the external environmental factors that shape the industry, the business-level strategy that the company used in the beginning and the way in which that had changed in 2022, and talking points to address the problems Southwest was having in December of 2022 and the development of a strategic plan to deal with the aftereffects of the meltdown of December 26.

Case Synopsis

On Monday, December 26, 2022, the CEO of Southwest Airlines faced a frightening dilemma. That day the company had been forced to cancel 1,615 flights and 2,882 more had been cancelled the preceding day which was Christmas—the nation’s biggest holiday. The Monday flights cancelled represented 70 percent of all Southwest’s flights, and the cancellations on Christmas day represented 42 percent of their flights for that day. Although the immediate cause of the cancellations was a severe winter storm that caused havoc all over the country, there appeared to be a bigger issue with some of the company’s systems that were purported to be massively outdated. As a result, the airline ended up with flight crews and airplanes located in the wrong cities. Bob Jordan, the CEO of Southwest Airlines, knew he needed to come up with a reassuring statement for the public and a plan of action within the next few days to keep what had always been their loyal customer base happy.

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MEADOWBROOK AT CLAYTON: IS IT A HIDDEN GEM?

Oi Lin Cheung, Indiana University East
Shari Fowler, Indiana University East
LaCalvince Simpson, Indiana University East

Case Objectives and Use

This case is most applicable in advanced strategic management and business capstone courses. It could also be used in an entrepreneurship or entrepreneurial finance class if the class consists of many marketing/management students who could lend their expertise to teams working on the case. Although it is highly recommended for use in upper-undergraduate and/or graduate-level courses, the case is also a good candidate for discussion in business and/or government workshops.

The objectives are:

1. Discuss accounting concepts
2. Analyze financial data
3. Perform a SWOT analysis
4. Formulate marketing strategies
5. Complete a brief business plan

Case Synopsis

“We have another loss this year. It has been for eight years straight that Meadowbrook has been in the red since it was donated to our city in 2015. Should the City take Meadowbrook’s operation more seriously to stop it from continuing to drain the city funds? Dayton, a city just a 19-mile drive away, closed two municipal golf courses in 2020 for financial reasons. Would it be better if we also close our own?” This may have been one of the expectations of Clayton residents when they saw Meadowbrook’s 2022 financial performance in the City of Clayton’s annual report. By the end of that year, Meadowbrook had a cumulative accounting loss of over two million dollars. A study found that Dayton could generate enormous savings by going solar on their closed municipality-owned golf courses. Given the financial and marketing challenges faced by Clayton, would the City be better off by following suit? This case examines the financials of Meadowbrook At Clayton, explores possible ways to overcome its marketing and promotion challenges, and proposes a brief business plan for the municipal golf course to follow in the near future.

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New Views Sessions

Presentation Titles	Panelists
Combining Case Method and Experiential Learning: Blue Ocean Hackathon	Oh Young Koo, INSEAD Blue Ocean Strategy Institute, France
Unpacking the Value of Live Case Projects: Sharing and Inviting Global Perspectives	Anna Czegledi, Conestoga College, Canada Michele M. McGowan, King's College, USA Vania Sakelaris, VAS & Associates Inc., Canada
Open Access Teaching Case Journal (OATCJ) - Opportunities and Barriers to Publishing Open Access Cases	Jane Gravill, Conestoga College, Canada Fatih Yegul, Conestoga College, Canada Kimberlee Carter, Conestoga College, Canada
Looking Out for Your Next (Case) Idea—Where to Start?	Armand Gilinsky, Sonoma State University, USA (emeritus) Geraldyn Brostrom, Sonoma State University, USA
Generative AI and the Case Method: ChatGPT & Beyond	Michael Goldman, University of San Francisco, USA María Ballesteros-Sola, California State University Channel Islands, USA Rob Boyle, Saint Louis University, USA James (Jim) Fisher, Saint Louis University, USA
Student Experiential Projects and Case Writing	Lisa Eshbach, Ferris State University, USA
CRJ Editorial Team Ask Me Anything Session	Eric Dolansky, Case Research Journal Editor, Brock University, Goodman School of Business, Canada Karen Boroff, Case Research Journal Associate Editor, Seton Hall University, USA Janis Gogan, Case Research Journal Associate Editor, Bentley University, USA (emerita) Randall Harris, Case Research Journal Associate Editor, Texas A&M University Corpus Christi, USA

How to Write Effective Cases Efficiently	David Wood, Ivey Publishing, Canada
Ambushed by AI and ChatGPT? Implications for the Future of Cases in Business-School Education	Organizers: Theresa Coates, Limestone University, USA Marilyn L. Taylor, University of Missouri at Kansas City, USA Vijaya (Vi) Zinnoury, University of Denver, USA
	Expert Panelists/Workshop Facilitators: J. Kay Keels, Coastal Carolina University, USA (emerita) Ning Su, Ivey, University of Western Ontario, Canada Erica Berte, Metropolitan State University, USA Tania Casado, Universidade de São Paulo - FEA/USP, Brazil
Toward a Model of Case Author Collaboration: Hard Learned Lessons on Case Team Writing	Kyleen Myrah, Okanagan College, Canada María Ballesteros-Sola, California State University Channel Islands, USA
Navigating Complexity in Teaching with Cases: Systems Thinking and Concurrent Engineering Approaches	Anna Czegledi, Conestoga College, Canada Hani AlShami, Conestoga College, Canada
Managing the Review Process	William (Bill) Naumes, University of New Hampshire, USA (emeritus) Margaret (Peggy) Naumes, University of New Hampshire, USA (retired)

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