ABSTRACTS ONLY

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CASE RESEARCH JOURNAL

OUTSTANDING TEACHING CASES GROUNDED IN RESEARCH

ERIC DOLANSKY, EDITOR

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The *Case Research Journal* (CRJ) publishes outstanding teaching cases drawn from research in real organizations, dealing with important issues in all administration-related disciplines. The CRJ specializes in decision-focused cases based on original primary research – normally interviews with key decision makers in the organization but substantial quotes from legal proceedings and/or congressional testimony are also acceptable. Secondary research (e.g., journalist accounts, high quality website content, etc.) can be used to supplement primary data as needed and appropriate. Exceptional cases that are analytical or descriptive rather than decision-focused will only be considered when a decision focus is not practical and when there is a clear and important gap in the case literature that the case would fill. Cases based entirely on secondary sources will be considered only in unusual circumstances. The Journal also publishes occasional articles concerning case research, case writing or case teaching. Multi-media cases or case supplements will be accepted for review. Contact the journal editor for instructions.

Previously published cases or articles (except those appearing in Proceedings or workshop presentations) are not eligible for consideration. The Journal does not accept fictional works or composite cases synthesized from author experience.

CASE FORMAT

Cases and articles submitted for review should be single- spaced, with 11.5 point Garamond font and 1" margins. Published cases are typically 8-10 pages long (before exhibits), though more concise cases are encouraged and longer cases may be acceptable for complex situations. All cases should be written in the past tense except for quotations that refer to events contemporaneous with the decision focus.

Figures and tables should be embedded in the text and numbered separately. Exhibits should be grouped at the end of the case. Figures, tables, and exhibits should have a number and title as well as a source. Necessary citations of secondary sources (e.g., quotes, data) should be included as endnotes at the end of the case (not at the end of the IM) in APA format. In the IM, necessary citations (e.g., citations of theoretical work from which the analysis draws) should be included using parenthetical author/year embedded in the text (similar to a traditional academic paper) that feeds into a list of references at the end of the IM. Note that the CRJ approaches citations differently in the case and the IM given the differing audiences for which each document is developed (i.e., the case is written for the student while the IM is written for the instructor). In some rare instances, footnotes may be used in the case for short explanations when including these explanations in the body of the text would significantly disrupt the flow of the case, but generally the use of footnotes in the case should be avoided if possible.

The following notice should appear at the bottom of the first page of the manuscript: Review copy for use of the Case Research Journal. Not for reproduction or distribution. Dated (date of submission). Acknowledgements can be included in a first page footnote after the case is accepted for publication, and should mention any prior conference presentation of the case.

It is the author(s)'s responsibility to ensure that they have permission to publish material contained in the case. To verify acceptance of this responsibility, include the following paragraph on a separate page at the beginning of the submission:

> *In submitting this case to the Case Research Journal for widespread distribution in print and electronic media, I (we) certify that it is original work, based on real events in a real organization. It has not been published and is not under review elsewhere. Copyright holders have given written permission for the use of any material not permitted by the "Fair Use Doctrine." The host organization(s) or individual informant(s) have provided written authorization allowing publication of all information contained in the case that was gathered directly from the organization and/or individual.*

INSTRUCTOR'S MANUAL

Cases must be accompanied by a comprehensive *Instructor's Manual* that includes the following elements:

1. **Case Synopsis**: A brief (three-quarters of a page maximum) synopsis of the case.
2. **Intended Courses:** Identification of the intended course(s) that the case was written for, including the case's position within the course. Please also indicate whether the case was developed for an undergraduate or graduate student audience.
3. **Learning Objectives:** The specific learning objectives that the case was designed to achieve. For more details on learning objectives, see the article titled "Writing Effective Learning Objectives" at the useful articles link.
4. **Research Methods:** A Research Methods section that discloses the research basis for gathering the case information, including any relationship between case authors and the organization, or how access to case data was obtained. Include a description of any disguises imposed and their extent. Authors should disclose the relationship between this case and any other cases or articles published about this organization by these authors without revealing the author's identity during the review process. If the case has been test taught and this has influenced the development of the case, this should be noted. This section should also indicate who in the organization has reviewed the case for content and presentation and has authorized the authors to publish it (note that this last component is not necessary for cases based on congressional or legal testimonies).
5. **Theoretical Linkages:** In this section please provide a brief overview of the theoretical concepts and frameworks that will ground the analysis/discussion of the case situation in theory and research. Please include associated readings or theoretical material that instructors might assign to students or draw on to relate the case to their field or to the course. In developing this section, recognize that business courses are often taught by adjunct faculty who are business professionals who may not be steeped in the theory of the discipline the way an active researcher might be. Develop this section with the intent of helping that type of instructor effectively apply and teach these theories/frameworks.
6. **Suggested Teaching Approaches:** Suggested teaching approaches or a teaching plan, including the expected flow of discussion with an accompanying board plan. Include a description of any role plays, debates, use of audiovisuals or in-class handouts, youtube videos, etc. that might be used to enhance the teaching of the case. Authors are strongly encouraged to classroom test a case before submission so that experience in teaching the case can be discussed in the *IM*. Authors are discouraged from including websites as integral resources for the teaching plan because websites are not static and the content of the website link may change between the writing of the case and an instructor's subsequent use of the case. This should also include a section on how best to teach the case online / remotely.
7. **Discussion Questions:** A set of assignment/discussion questions (typically three to ten depending on discipline) that can be provided to students to organize and guide their preparation of the case. For most cases, either the final or the penultimate question will ask students for their recommendation on the overarching decision facing the decision maker in the case along with their rationale for that recommendation.
8. **Analysis & Responses to Discussion Questions:** This section of the IM represents the core of the case analysis. Repeat each assignment/discussion question, and then present a full analysis of that question that demonstrates application of relevant theory to the case. Note that the analysis in this section should go beyond what a good student might present as an 'answer' to the question. Write to the instructor with an eye toward helping him or her understand in detail how the theory applies to the case scenario, how discussion of this particular question might be approached with students, where the limitations in the theory might be relative to the case scenario, and how the analysis contributes to the building of an integrated recommendation regarding the decision the case protagonist must make.
9. **Epilogue:** If appropriate, an epilogue or follow-up information about the decision actually made and the outcomes that were realized as a result of the decision made.
10. **References**: Provide full citations (in APA format) for all references that were cited in the Instructor's Manual.

Review Process

All manuscripts (both the case and the instructor's manual) are double-blind refereed by Editorial Board members and ad hoc reviewers in the appropriate discipline. Most submissions require at least one round of revision before acceptance and it is common for accepted cases to go through two or more rounds of revisions. The target time frame from submission to author feedback for each version is 60 days.

Distribution of Published Cases

The right to reproduce a case in a commercially available textbook, or instructor-created course pack, is reserved to NACRA and the authors, who share copyright for these purposes. After publication, CRJ cases are distributed through NACRA's distribution partners according to non-exclusive contracts. NACRA charges royalty fees for these publication rights and case adoptions in order to fund its operations including publication of the *Case Research Journal*. Royalties paid are split 50/50 between NACRA and member authors.

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Submit the case manuscript and Instructor's Manual in one document via the *Case Research Journal* ScholarOne website at **http://mc.manuscriptcentral.com/nacra-crj.** This site provides step by step instructions for uploading your case. You will also be provided the opportunity to upload two case supplements – this is to allow submission of a spreadsheet supplement for the student and for the instructor if needed. No identification of authors or their institutions should appear on either the main case/IM document or on the spreadsheets. All identifying information should be removed from the file properties before submission. If you have audiovisual content to your case, please contact the editor to determine the best way to make this content available to reviewers without revealing the authors' identities.

At least one author must be a member of the North American Case Research Association. Membership dues are included in annual registration for the NACRA conference, or may be paid separately through the main NACRA website.

For questions, contact:
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From the Editor

Very focused decisions are a big deal at the Case Research Journal. Anyone who has submitted work to CRJ knows that reviewers and the editorial team will push, prod, cajole, and coerce them into making their case and instructor's manual extremely focused. In this way, a wide scope or a lot of decisions, theories, or case components are not a plus. So how is it, then, that the theme of this editorial is that cases have a very wide scope?

While each individual case needs to be narrowly focused to make sure that educators and students get the most out of it, cases (plural) cover such a wide range of topics, concepts, experiences, and contexts as to provide a rich tapestry for classes and courses. That is a key aspect of using field-based research, such as case research, in education; by providing real-world situations, showing actual people facing actual decisions, students learn in a valuable (and completely different) way. Throughout my career as a marketing professor, including the week that I write this editorial, I have heard students asking for more opportunities to apply theory, to use what they have learned, and to tie classes more closely to business practice.

The cases in this issue represent a host of contradictions between them (within each, I assure you, is content as focused and well-honed as in any CRJ cases!). There are cases by authors who have published many times in CRJ, authors who have published once or twice, and two cases by authors who have never published in the journal. There are authors from all over the world (Canada, the United States, Colombia, India, and Pakistan) with the case settings in even more countries (add Peru and the United Arab Emirates to the list). There are cases in this issue set in the for-profit world, and cases set in the not-for profit world; there are cases where the decision is intensely personal, and cases where the decision has profound societal implications (one case even has both).

As editor, I track many of the above across all cases published each year, to ensure that the content published in this journal represents not only the diverse community of case researchers, but also the wide world out there that our students will be entering upon graduation. In Volume 43 of CRJ (issues published in 2023), 57% cases were set (at least in part) in North America, and 47% outside of North America; this is part of a trend towards internationalization over the past few years (in 2021, 84% of cases in CRJ were set in North America). Also in 2023, 74% of cases were about for-profit businesses (consistent with previous years) and 57% featured a case protagonist from an equity-deserving group. I share these figures because I believe transparency is important, but also because I am proud of the steps CRJ has taken to reflect the diversity of our community.

The cases in this issue continue to reflect this. In "Bagallery: In Search for the Operating Model for Growth," by Farah Naz, Mohsin Zamir, and Tooba Siddiqi, marketing and operations considerations are combined in a critical decision for the focal company. This fashion, lifestyle, and beauty e-commerce platform in Pakistan had been using a pre-order model, but was considering other ways of managing inventory and fulfillment for customers. Combining the Operating Model Canvas with traditional marketing considerations like target market and positioning, and utilizing strong quantitative analysis, students must make and support a decision.

"Renewable Energy or International Farm Growth: Shifting the Flow at Livestock Water Recycling," by Brooke Klassen, also examines the growth issue, but in this case the decision is mainly about continuing to expand internationally with a proven product, or taking advantage of a new opportunity in the United

States energy market. Using international expansion frameworks and detailed internal analysis of resources, this case is set in the critical context of water security and sustainability.

Moving from the company perspective to a very personal one, "Carol Aldana: Is It Time to Leave?" by Juan M. Parra, is a case about one person's decision about her career. The decision maker, Carol Aldana, worked in a role that was very demanding and for a boss who was even more so. After a series of incidents that demonstrated the negativity of her workplace, Aldana was offered a new role at a different company. Aldana intended to take the new role, but her current boss asked her to delay so she could complete her existing responsibilities. Should she fulfill her obligations, or move to the new organization on their timeline? This case adds an extended epilogue, with two additional decision points for instructors to use during the discussion.

Another personal decision, but with societal consequences, can be found in "Joining the Dots: Matching Unidentified Dead Bodies to Missing Person Reports in India," by Rajnish Rai. The protagonist of this case, head of a police zone, must decide whether to launch the app he developed, which could match photos of unidentified and unclaimed dead bodies with photos of missing persons. The Director General of Police had been slow to approve the project (and his approval was not wholehearted), and, as of the time of the case, had become unresponsive. The protagonist could distribute the app through his own network without official permission, or he could wait for the Director General to respond, but the longer he waited, the more time elapsed with people not knowing what happened to their loved ones.

The fifth case in the issue is "Mayor Muñoz's Grand Challenge: The Acho Bullring Controversy," by Remy Balarezo, Vijaya L. Zinnoury, Renzo Garcia, Paul Corcuera, and Verushka Gutierrez. Set during the Covid pandemic, this case looks at how community leaders (including the mayor) dealt with homelessness during that crisis. In particular, the case examines the decision about whether to use a public sports arena, the Acho Bullring, to house the unhoused. Using the perspectives of the UN Sustainable Development Goals and a framework that examines Grand Challenges, this case has students wrestle with a difficult decision involving several stakeholders, and with the health and well-being of a major city's most vulnerable citizens at stake.

As I am with all issues of CRJ, I am proud of the work put in by the authors, reviewers, and editorial team on this issue. I think these are cases that can work in a variety of courses, programs, and for different students; after all, they are five very different cases, with different learning objectives, different theories and concepts, different contexts, and different ways of managing the class. I hope that you find that one or more of these is suitable for your course. If you have any comments, questions, or feedback, please feel free to contact me at edolansky@brocku.ca.

Eric Dolansky, Editor
Case Research Journal

Abstracts Only

CRISIS MANAGEMENT

- *Crisis Management*
- *Non-Profit Management*
- *Public-Private Partnerships*
- *Social Entrepreneurship*
- *Social Responsibility*

Mayor Muñoz's Grand Challenge: The Acho Bullring Controversy 1

Vijaya Zinnoury,* University of Denver, Remy Balarezo, Renzo Garcia, Paul Corcuera, and Verushka Gutierrez, Universidad de Piuria [2101 S. University Blvd., Denver, CO 80208, Vijaya.Zinnoury@du.edu]

On March 22, 2020, a controversy erupted following Mayor Jorge Muñoz's television announcement that the city was considering using the Acho Bullring in Lima, Peru as a shelter to quarantine the homeless individuals of Lima at the beginning of the onset of COVID-19. Mayor Muñoz and Willy Ackermann, President of the Lima Charity, faced the decision of whether this was a viable option, considering the controversy and opposition it had sparked in the community. This case delves into homelessness, a grand challenge facing nations – developed and developing – and included in the United Nations' Sustainable Development Goals (UN SDGs). An important goal behind writing this case was to raise the consciousness of students (our future business leaders) and engage them in understanding and addressing the significant global issue of homelessness, which is often approached primarily from a philanthropic standpoint but necessitates a professional perspective.

Students have the unique opportunity to understand the genesis of homelessness and engage in a discussion of the challenges involved from a multi-stakeholder perspective, by stepping into the shoes of Muñoz and Ackermann as the protagonists confronted the challenge of how and where to quarantine the people experiencing homelessness in Lima, Peru.

Intended Courses and Levels

This case is appropriate for use in executive, graduate and undergraduate courses in:

- Crisis management/disaster management
- Non-profit management
- Public-private partnerships
- Social entrepreneurship
- Social responsibility

It may also be used in the UN Sustainability Development Goals (UN SDGs) module taught in a lobal management or strategic management course.

Learning Objectives

The case learning objectives are as follows.

- Analyze the causes and consequences of homelessness and identify why it is a Grand Challenge.

- Evaluate stakeholders and their importance for addressing Grand Challenges by applying the George et al. (2016) framework.
- Examine feasible options regarding housing people experiencing homelessness.
- Decide the best short-term option for quarantining people experiencing homelessness in Lima, Peru.

HUMAN RESOURCE MANAGEMENT

- *Human Resource Management*
- *Talent Management*
- *Employee Retention*
- *Employee Satisfaction*
- *Motivating People*
- *Work-Life Balance*
- *Career Changes*
- *Morale*
- *Turnover*

Carol Aldana: Is It Time to Leave? 17

Juan M. Parra,* INALDE Business School [Campus U. Sabana, Autopista Norte, Km. 7, Costado Occ, Chía, Colombia, 140013, juanm.parra@inalde.edu.co]

Carol Aldana, Director of Accounting and Taxes of Retail Holdings Corp. (RHC), received a job offer to assume a managerial position in one of Colombia's largest construction business groups. However, she was working on an international consolidation project after an merger and acquisition deal, for which her boss considered her work vital. Her boss also expected Aldana to accept an internal promotion to a regional position, forcing her to travel regularly. Aldana, a single mother additionally responsible for supporting other family members, wondered whether she should take advantage of the promotion opportunities offered by her current employer or accept the job offer. She applied for the external job and was selected, with a similar salary to what she was already receiving, but with better work-life balance and development opportunities. However, she was told that she needed to start within a month. When Aldana talked things over with her boss, he demanded that Aldana stay for three additional months to hand over the position and meet the previously agreed deadlines.

Intended Courses and Levels

This case was originally developed for MBA and Executive Education programs. It is suggested for use in courses on the fundamentals of human resources management, particularly in modules on talent attraction and retention. It is interesting in that: 1) it is narrated from the perspective of the employee who, without actively looking for a job, finds an unexpected offer that responds to certain unsatisfied needs that her current employer has not been interested in addressing; 2) it shows how certain shocking events within the employment relationship can trigger the search for new opportunities among committed employees who are perceived as very loyal to the organization and not only the 'usual suspects' (unsatisfied low-commitment employees); and 3) it illustrates the process of losing executive talent from one company and how another company manages to capture it, largely as a consequence of how bosses manage people and mediate when employees announce they are leaving.
The case is also useful in OB courses in modules related to career plans and professional development.

Learning Objectives

After discussing this case, participants will be able to:

- Analyze the process of talent turnover in organizations from the individual's perspective (how and why people decide to leave) and how it relates to the employee's lifecycle.
- Judge how career anchors affect an employee's lifecycle within a company.
- Determine the role that managers play to induce or prevent turnover.
- Determine how the levels of satisfaction and commitment are a necessary condition, but not enough, to prevent people from leaving.

MARKETING

- ***Marketing***
- *Operating Model Canvas*
- *Marketing Strategy*
- *Positioning*

Bagallery: In Search for the Operating Model for Growth 27

Farah Naz, * Institute of Business Administration (IBA) Karachi, Mohsin Zamir, ASB Bank, New Zealand and Tooba Siddiqui, K-Electric [IBA, Karachi, Karachi University, Karachi, Pakistan, 75270, fbaig@iba.edu.pk]

Bagallery, a leading Pakistani e-commerce platform specializing in fashion, beauty, and lifestyle products, faced a critical decision about its operating model and how to align with customers' expectations and achieve rapid growth. After securing $4.5 million in Series A funding, Bagallery's co-founders prepared for an upcoming quarterly meeting with venture capitalists. The company's existing pre-order model enabled product variety by procuring items based on customer orders. However, government restrictions and resulting supply chain delays caused fulfillment challenges, forcing a reevaluation of operating models. Two alternatives were considered: the in-stock model, which reduced lead times by selling only warehouse inventory, and the drop-shipping model, where suppliers directly delivered orders. While the pre-order model supported variety, it risked customer satisfaction due to delays. Each model had trade-offs in scalability, efficiency, and customer appeal. Co-founders Salman, Sattar, and Arif debated their options, aiming to satisfy customers, drive sales, and meet investor growth expectations.

Intended Courses and Levels

This case is intended for the distribution module of the general Marketing courses such as Marketing Management or Marketing for Startups, at the undergraduate level. This case could also be taught in entrepreneurship courses, as it shows a startup's operational decision and its possible impact on growth. At the Institute of Business Administration (IBA), Karachi, this case was developed for Undergraduate students for the distribution module of Marketing Issues in Pakistan (MIP) course. MIP is an advanced and applicative version of the Principles of Marketing course. This case can be taught in a 90-minute class. It provides an opportunity to understand the interaction of the operating model canvas (OMC) and the overall marketing strategy. It helps students understand the importance of alignment between the company's customers: who they are, what value is offered to them, and how value can be created through decisions related to supply and distribution involving processes, people, and systems. In other words, this case helps the reader to understand the linkage between the strategic and operational dimensions, and how the different operational alternatives are impacted by positioning.
Students often come to class with little or no background in operating models for e-commerce businesses.

They are mostly unaware of how these models influence a company's growth and profitability. Growth is crucial for start-ups as it is a requirement by venture capitalists who fund their projects.

Learning Objectives

The story of Bagallery illustrates how start-ups evolve and transition to different stages of growth. The evolution of the business may involve the evolution of the positioning and the OMC. The case teaching goals include:

- Understand the marketing strategy.
- Understand the operating models.
- Explain the relevance of operating models in relation to marketing strategy.
- Evaluate model alternatives and their impact on small business's growth.
- Synthesize different analyses and recommend actions that satisfy customers and support company growth for investors.

PUBLIC POLICY

- ***Public Policy***
- *Problem-solving framework for policy implementation*
- *Innovation*
- *Technology adoption*
- *Lack of leadership support*
- *Organizational politics*
-

Joining the Dots: Matching Unidentified Dead Bodies to Missing Person Reports in India **43**

Rajnish Rai* Indian Institute of Management, Ahmedabad [Vastrapur, Ahmedabad 380015, Gujarat, India, (91)94850-77700, rajnishrai@iima.ac.in]

In India, over 40,000 unclaimed/unidentified dead bodies (UIDBs) were reported annually, exerting immense strain on police forces. This case intimately follows IPS officer Rakesh Kishan's strategic response to this crisis. Grappling with resource constraints, Kishan deftly developed an IT-based solution to match unclaimed/UIDBs with missing person reports, skillfully capitalizing on media and political pressure. Kishan's unrelenting resolve drove a pivotal initiative amid bureaucratic resistance and intricate organizational dynamics. Beyond delving into the complex stages of problem-solving — problem identification, solution development, and implementation — this case underscores the societal significance of resolving the UIDB challenge.

Intended Courses and Levels

The case is designed for MBA core courses on public policy, government decision-making, and organizational leadership, especially focusing on the policy implementation stage of the policy cycle. It is equally relevant to courses in public administration and public sector management offering insights into organizational behavior, IT implementation, leadership, and conflict resolution by analyzing the protagonist's experience in developing an IT-based solution to match unclaimed/UIDBs with MPRs.

Additionally, the case is suitable for project management courses with modules on stakeholder consultation and communication, where students can analyze the protagonist's approach to garnering support and addressing challenges. It can also be incorporated into courses focusing on criminal justice, providing insights into the challenges faced by law enforcement agencies in improving service delivery through technology.

Executive programs designed for senior public servants in government and law enforcement agencies involved in service delivery can also benefit from this case. It presents an opportunity to develop problem-solving skills, promote innovation in addressing public problems, and learn skills for managing and implementing organizational change effectively.

Overall, the case study provides MBA students, senior public servants, and project management professionals with an engaging and thought-provoking learning experience. It offers a unique and compelling perspective on the challenges of public service delivery, underscoring the importance of strong leadership, innovative problem-solving, and evidence-based policymaking.

Learning Objectives

- Introduce the students to a problem-solving framework for effectively implementing public policy solutions.
- Examine the strategies actors employ to mobilize resources and garner support for innovation when leaders are reluctant.
- Assess the impact of organizational micro-politics and leadership support (or lack thereof) on the decision-making process for project management.
- Analyze the potential for technological innovation to enhance organizational effectiveness by addressing crucial policy problems.
- Evaluate the impact of strategies adopted for leading organizational change.

STRATEGIC MANAGEMENT

- ***Strategic Management***
- *Internal Analysis*
- *Competitive Analysis*
- *International Business*

Renewable Energy or International Farm Growth: Shifting the Flow at Livestock Water Recycling **63**

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Karen Schuett, CEO of Livestock Water Recycling (LWR), had grown the Canadian agricultural technology company by designing systems to convert manure into clean water and nutrients that could be reused as farm fertilizer or as an input to generate renewable energy (biogas). Recently, U.S.-based energy companies approached LWR with interest in customizing its systems to improve biogas output. In February 2023, Schuett was faced with the pivotal decision of whether to focus on international farm-based markets, or pivot to develop a new business model aimed at assisting U.S. energy companies in renewable energy generation. Students are challenged to identify and assess a company's strategic resources and capabilities, critically evaluate market segments and competitive forces, and consider the complexities of pivoting a business model - all to inform a high-stakes strategic decision.

Intended Courses and Levels

The case is suitable for use in undergraduate-level courses on strategy and/or decision making. It could be used to practice VRIO analysis, market analysis, competitive analysis and business model analysis before integrating the analyses to make a strategic decision.
It could also be used in an international business class when describing the different modes of entry into foreign markets and discussing how geographic and cultural distance influence decision-making.

Learning Objectives

After completing the case study, students will be able to:

- Analyze a company's resources and capabilities to delineate its core competencies and sources of competitive advantage.
- Evaluate different market segments and justify reasons for selecting particular options.
- Analyze competitor information to form strategic insights.
- Evaluate current and potential business models to assess adaptability and potential for success.
- Integrate analyses of internal competencies, market segments, competitors, and the current business model to formulate a strategic decision.
- Apply an international business expansion model to a case scenario and recommend modes of entry into foreign markets.

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