

N A C R



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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 10th year of the program's operation. The CRF has now awarded a total of 92 fellowships.

In 2024, the Case Research Foundation awarded fellowships to the following 10 individuals:

Mithila Guha	United States	San José State University
Ulrik Roehl	Denmark	Copenhagen Business School
Xiangming (Tommy) Tao	United Kingdom	University of Sussex
Ann Mary Varghese	India	Indian Institute of Technology Kharagpur
Pankaj Anand	United Kingdom	University of Strathclyde
Homeira Ekhtari	Canada	Conestoga College
InHaeng Jung	United States	Sonoma State University
Ryan DeFronzo	United States	California State University, Fullerton
Vijay Krishnamurthy	India	University of Mysore
Pouneh (Penny) Sadeghi Shabestari	United States	University of Wisconsin-Milwaukee

In addition, this year the CRF welcomes to the conference the following member of a prior cohort of Paul R. Lawrence Fellows, who has had a start-up case accepted for presentation:

Samir Biswas	India	Indian Institute Of Management–Udaipur
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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, Open Access Teaching Case Journal, 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 2025 applications will be available in February 2025 via CRF website.

JOHN SEEGER START-UP CASES WORKSHOP

Thursday, October 17, 1:00 PM – 3:00 PM

Workshop Host: Randall Harris, Texas A&M University – Corpus Christi

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.

Nicole Amos, University of Massachusetts Amherst
 Christopher M. Cassidy, Sam Houston State University
 Eric Dolansky, Brock University
 James (Jim) Fisher, St. Louis University
 Armand Gilinsky, Sonoma State University (emeritus)
 Janis Gogan, Bentley University (emeritus)
 Michael Goldman, University of San Francisco
 Anne T. Lawrence, San Jose State University (emerita)
 Rebecca Morris, Westfield State University
 Jeff Shay, Babson College
 Javier Silva, UCU Business School
 Ram Subramanian, Stetson University
 Cheri Thomas, University of Tennessee Southern
 John Varlaro, Johnson & Wales University
 Meredith Woodwark, Wilfrid Laurier University
 Vijaya (Vi) Zinnoury, University of Denver

Case Author(s)	Start-up Case Title
Muntasir Alam	Kevin’s Exit from Heatherica and the Aftermath of an Exit
Eman Almehdawe	Ambulance Offload Delays at The Region of Waterloo, who is Responsible for the Delays?
Hani AlShami Anna Czegledi Lom Harshni Chauhan Fatih Yegul Carol Samuels Alexander Miller	Ethical Considerations and Hiring Biases in AI-powered HR Systems at Workday
Hani AlShami Anna Czegledi	Balancing Mission and Viability in Non-Profit Organizations: Strategic Choices in Immigrant Employment Services
Julia Baird	WWF-Canada: Designing Collaborative Watershed Governance to Meet Conservation Objectives, Now and in the Future
Samir Biswas	Indian Railways: Capacity Augmentation in Electrical Power Stations
Carla Marieli Delmiro Capeli Victor Silva Corrêa Helena Belintani Shigaki Pedro Lucas de Resende Melo	Entrepreneurial Marketing at Life Institute: A Case Study in an Emerging and Developing Country
Ryan F. DeFronzo	Will Pepsi Lose its Fizz? Marketing in the Age of AI

Case Author(s)	Start-up Case Title
Vafa Saboori Deilami Chang Seob Yeo Yung-Jae Lee Sarah Lee	Labcon North America
Priya Dozier	A Fintech Fumble: The Conscious Uncoupling of FIS and Worldpay
Homeira Ekhtari	Switching to a Net-Zero Home: A Good Choice or a Headache?
Fernando Garcia Stephen Ray Smith Amy Burger	Latin American Association
Victoria Geyfman Christian Grandzol	Business Valuation of ABC Liquors
Lucy Gill-Simmen Ling Xiao	Made for Drink: Crafting a Sustainability Brand Story
Mithila Guha	Leveraging Social Impact Marketing: REI's #OptOutside Campaign
William C. Hawks	Company Policies Matter: Starbucks Versus the Memphis Seven
InHaeng Jung	Sustaining Lodi Vines Amid Economic and Environmental Shifts
Vijay Krishnamurthy Sanjeev Tripathi	Anantapur Sports League: Social Impact Through Football
Tatiana Levit Nourhene Ben Youssef	University of Regina Club: Marketing to the Rescue?
Moises Librado-Gonzalez Natanael Ramirez-Angulo German Osorio	Ciadmype UABC: A Center for Poor Microenterprises in Tijuana, Mexico
Ebrahim Mazaheri	Reality Foods: Navigating Growth in the B2B Food Distribution Sector
Terry McGovern Helene Johnson	Helene Johnson: Now You See Me, Now You Don't
Sonia Mehrotra Anna Czeglédi	Royal Botanical Gardens, Ontario: The Sustainability Leaders
Mónica Olalde Lilia Patricia López	The Decision-Making Process at Critical Moments – CNH Case Study
Krystal C. Onyema Shari S. Bowen	He's Driving me Crazy: On Power & Influence Among Peers
Anna Papazian	Precision Auto: Amplifying Success Through Strategic Finance
Ulrik B.U. Roehl	Pushing the Limits of Digital Government: What's Next, KOMBIT?
William D. Schneper Sujal Shah	The Chaudhary Group in 2024: Looking Towards the Future
Pouneh Sadeghi Shabestari,	The Shadow Artist: The battle of Ownership in the Generative AI Era
W. Scott Sherman Randall D. Harris	Boeing 2024: Searching for a New CEO
Redwan Siddiqui Fatih Yegul	CN Rail Acquires TransX: Offering Door-to-Door Convenience of Trucking with the Cost-Efficiency of Rail

Case Author(s)	Start-up Case Title
James Siew	Reconciling Corporate Social Responsibility Within Sustainability
Tyler F. Stillman Dave Lunt	Alexander the Great: Entrepreneur?
Xiangming (Tommy) Tao	From Dorm Room to Foorsteps: The rise of HungryPanda in Global Food Delivery
Ann Mary Varghese Rudra Prakash Pradhan	Zum's Sustainability Aspirations: Sparking School-Bus Electrification Across America
Janis Warner Kamphol Wipawayangkool	Shutting Down the Phishing Hole to Avoid a Crisis: Carrot or Stick?
Anna Tsui Po Yung	Teaching HRM in the AI era: Selecting Neufast's AI Video Interview System.
Muhammad Zahid Munaza Bibi Muhammad Zeeshan Mirza, Haseeb Ur Rahman Ahmad Asad	RJ Mall, Karachi Pakistan: A Case of Fire Safety Concerns

Pedagogy Track: Developing Case Scholarship in Teaching and Research

Track Chairs: S. Bruce Thomson, MacEwan University

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

Session Chair: S. Bruce Thomson

Papers & Proposals

Authors

Cases as Intellectual Contributions

Sarah Holtzen

Global Faculty Perspectives on Active Learning via Live Case
Projects

Sonia Mehrotra
Anna Czegledi
Olga Kandinskaia

The Dilemma of Teaching Unions in SE USA

Theresa Coates
Marilyn Taylor
Janet Bartholow

Using Assessment Centre Methodology as a Pedagogical
Innovation During Case Teaching in Talent Management Courses
in HRM

Sushmita Srivastava
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Writing Teaching Notes

S. Bruce Thomson
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CASES AS INTELLECTUAL CONTRIBUTIONS

Sarah Holtzen, Missouri Southern State University

Research Objectives

Through this article, I hope to add another perspective to the ongoing conversation surrounding teaching cases as a scholarly contribution. First, I provide a brief overview of the comparisons drawn between published teaching cases and other, more traditional forms of research. Then, I share insights into my own experience as a junior faculty member at a small, rural institution navigating AACSB accreditation as a teaching institution. Finally, I hope to receive additional feedback and insights from NACRA conference participants to create guidelines, suggestions, and other forms of support for faculty at similarly small institutions interested in publishing teaching cases as a form of scholarly contribution toward promotion and tenure decisions.

Theoretical and Practical Contributions

The anticipated contributions of this article are primarily practical in nature. As a major goal, I hope to provide concrete guidelines for faculty at smaller universities wishing to pursue case research and teaching as a scholarly activity that could count toward tenure and promotion.

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 2024 Conference, Orlando, Florida, USA, October 17 - 19, 2024. © 2024 by Sarah Holtzen. Contact person: Sarah Holtzen, Missouri Southern State University, 3950 E. Newman Road, 417-659-4031, Holtzen-S@mssu.edu.

GLOBAL FACULTY PERSPECTIVES ON ACTIVE LEARNING VIA LIVE CASE PROJECTS

Anna Czeglédi, Conestoga College
Olga Kandinskaia, University of Limassol
Sonia Mehrotra, S.P. Mandali's S.P. Mandali's Prin. L.N. Welingkar Institute of Management,
Development, and Research

Research Objectives

For decades, there has been a move towards including work-integrated learning projects or experiences in the curricula of universities and business schools, which falls within the broader goal of active learning. Among these, live case projects (LCPs) are a unique form of experiential learning, providing students with direct interaction with company leaders to address real-time business challenges. Unlike traditional classroom case studies, LCPs actively involve a company representative in the educational process. We defined a Live Case Project (LCP) as a project-type academic course or element of a course in which students were introduced to a current real-life business challenge presented to them by a company's manager(s). With the rise of AI tools, educators' tasks are even more demanding. There is a dramatic need to re-vamp our teaching strategies to ensure meaningful learning happens and that we are preparing humans (future managers) to lead and use AI tools rather than humans being led by AI. This paper aimed to understand issues, challenges, and successes in adopting LCP in business management programs in higher education institutions. We addressed six research questions:

RQ1: What is the strongest motivating factor for faculty to start using live case projects (LCPs)?

RQ2: What advantages do LCPs offer for students' learning?

RQ3: What are the biggest challenges in running an LCP?

RQ4: How do faculty perceive their workload when including an LCP?

RQ5: How do faculty find corporate partners for LCPs?

RQ6: What are the main reasons for faculty to avoid using LCPs?

Theoretical and Practical Contributions

While there are opportunities to embed LCPs in the university and business school curricula, failure to comprehend their benefits by faculty and administrators, combined with the perception of excessive workload, often results in non-implementation. This study explored global faculty perspectives on LCPs, including challenges related to implementation. The results indicated that the prime motivator for using LCP was its efficacy as a teaching strategy, followed by school's requirements, typically a strategic focus on immersive learning. We found that faculty observe a solid improvement in the knowledge and skills of their students as a result of including LCPs in their curriculum. The paper's contribution to the existing literature consisted of bringing together faculty experiences in running LCPs globally, highlighting commonalities and differences across various countries, and, ultimately, providing up-to-date recommendations on running live case projects in the new age of AI applications. This paper will help faculty run live case projects (more) efficiently and (more) effectively. Even though limited by the short format of the paper, we provided illustrative examples and tips, allowing faculty to do much more within the limited time that schools usually assign for this type of activity. The paper will be useful also to school administrators looking for ways to enhance active learning and include experiential learning in the school's programs, as well as company managers who may be seeking win-win opportunities to work together with academia.

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 2024 Conference, Orlando, Florida, USA, October 17-19, 2024. © 2024 by Anna Czeglédi, Olga Kandinskaia, Sonia Mehrotra. Contact person: Sonia Mehrotra, S.P. Mandali's Prin. L. N, Welingkar Institute of Management Development and Research, E 102/103 Electronic city Phase 1, Benaguru 560100, sonia.mehrotra@welingkar.org.

THE DILEMMA OF TEACHING UNIONS IN SE USA

Theresa Coates, Limestone University
Marilyn Taylor, University of Missouri Kansas City
Janet Bartholow, Limestone University

Research Objectives

The intent of the case is to explore issues in a constructivist approach to teaching students in the classroom given the characteristics they don't read or engage in discussion. The point of the case is to develop assignments, materials, and techniques which help with student engagement and collaborative student learning. The case and teaching note address as situation a faculty member, Anne Blakely experiences in taking over a course which is not her main focus, revamping it, while achieving student learning outcomes.

Theoretical and Practical Contributions

The contribution of the case is to start discussion and find solutions which might help professors and instructors engage students in the classroom. The authors present using a video and developing a game to elicit both learning and collaboration between students. The intent is to think through the practical application of using such methods.

The authors developed the article to propose future directions and evolution of the Case Method of Teaching. The article was anonymously peer-reviewed for presentation at the NACRA 2024 Conference, Orlando, Florida, USA, October 17 - 19, 2024. © 2024 by Coates, Taylor & Bartholow. Contact person: Theresa Coates, Limestone University, tcoates@limestone.edu.

USING ASSESSMENT CENTRE METHODOLOGY AS A PEDAGOGICAL INNOVATION DURING CASE TEACHING IN TALENT MANAGEMENT COURSES IN HRM

Sushmita Srivastava, SP Jain Institute of Management and Research
Deb Mallya Chatterjee, SP Jain Institute of Management and Research

Research Objectives

While competency mapping in talent management is taught to students in an HRM course, there is a need for more hands-on, practical exposure. The design of the Student-led Assessment Centre methodology covering the entire gamut from design to execution of an Assessment center helps the student not only understand the concept of the Assessment Centre but also about observing, measuring, and Evaluating behaviors that not only help them further their understanding of but make them effective professionals at the workplace.

Theoretical and Practical Contributions

The Assessment Centre design methodology is based on Service Design Blueprinting concepts. Students will be equipped to run this effectively when they need to coordinate Assessment Centres at the workplace in organizations. The learning has high application value.

It helps students acquire and develop the critical skill of understanding competencies that are vital in the future world of work

The authors developed the article to propose future directions and evolution of the Case Method of Teaching. The article was anonymously peer-reviewed for presentation at the NACRA 2024 Conference, Orlando, Florida, USA, October 17 - 19, 2024. © 2024 by Sushmita Srivastava, and Deb Mallya Chatterjee. Contact person: Sushmita Srivastava, Associate Professor, SPJain Institute of Management and Research, Sushmita.srivastava@spjimr.org.

WRITING TEACHING NOTES

S. Bruce Thomson, MacEwan University
Jasmin Lin, Rockwell School of Business
Daisy Wang, East Stroudsburg University
Vicky Nie, City University of Seattle

Research Objectives

Our objective is to increase the discussion around what makes a good teaching note. Therefore, we review what has been said and apply some of our own experience.

Theoretical and Practical Contributions

Case writing involves not just writing the case but also creating the teaching notes for the case. But what is that process – writing teaching notes? The case presents the story and the problem or issue that must be addressed. The teaching notes outline the knowledge and application of that knowledge to solve the problem or issue. Teaching notes should be designed to help the instructor get the most from the case through insights provided by the author (Yue, 2016). The length of the teaching note is not dictated by the length of the case. Good teaching notes need to provide enough information and detail about the concepts and theories, and the application to the case (Yue, 2016). The instructor using the case should not need to do any extra research to use the case.

The key to case learning is discussion, so that the students learn from multiple sources – the case the instructor and each other. The value is in the discussion so students should have ample opportunity to discuss the different elements and the application of theory. This is where instructors must practice flexibility and realize when enough has been said. Understanding that flexibility and timing is the trickiest part of using the case study learning process. However, one of the keys to writing great teaching notes is pre-testing the case in a classroom setting (Emerald Cases Hub, 2023). The instructors will test run the case to work out those timing issues and find out where the discussion is most likely to be generated. Thus, the teaching plan is not mere guesses but based on actual use in the classroom.

One last point is that whoever writes the case does not need to be the same person who writes the teaching notes. Whoever writes the case does have an intimate knowledge of the case but an individual looking at it with fresh eyes may see application that the author did not. Also writing cases with more than one author introduces more knowledge and expertise that adds insight into the case.

Keep your teaching notes straightforward, simple, clear and reliable by pretesting them with your students. Ask them questions about the effectiveness of the case. Use their feedback to make it better. The point of writing great teaching notes is to make it easier to use, which results in more knowledge gained by the students and the instructor.

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 2024 Conference, Orlando, Florida, USA, October 17 - 19, 2024. © 2024 by Thomson, Yin, Wang & Nie. Contact person: S. Bruce Thomson, MacEwan University, 10700 104 Ave, Edmonton, AB Canada T5J 4S2, 01 780 680 2920, thomsons2@macewan.ca.

Accounting, Finance, and Economics Cases

Track Chair: Anna Czegledi, Conestoga College

Co-Chair: Jan Serrano, Francis Marion University

Session Chair: Jan Serrano

Cases

Johnson and Johnson: An Unusual Stock Exchange Offer

Hindenburg Research & The Adani Group (2023)

Lagom Design Shop: The Exclusive Edge

Drakko a Bumpy Ride

Mostly Mental Shuttles: A New Beginning

Real Estate Investment Analysis: Hyatt House

From Informality to Growth: Challenges in the Accounting Practices of a Peruvian Corner Store Owner

How Can She Make a Legitimate Real Estate Purchase Offer in a Non-Disclosure State?

Authors

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Javier Rovar
Alvaro Moreno

Wayne Singular

Glenn Williamson
Felipe Ernst

Gloria Maria Regina Zambrano
Aranda
Luis Demetrio Gomez Garcia
Emerson Jesus Toledo Concha

Charles Hilterbrand Jr.
Sergio Garate
Violetta Davydenko

JOHNSON AND JOHNSON: AN UNUSUAL STOCK EXCHANGE

Susan White, University of Maryland
Karen Hallows, University of Maryland

Case Objectives and Use

This case is appropriate for an undergraduate or graduate finance intermediate or advanced corporate finance elective, particularly one that includes restructuring events. Stock exchange offers are generally not covered in introductory finance courses, and students should have taken basic finance principles before analysing this stock exchange. It would also be appropriate for an investments class where stock exchange issues are discussed. Students will be able to explain what an exchange offer is and why firms use them. They will also value a company before and after the exchange, perform a financial statement analysis and determine the impact of restructuring on a firm's stock price.

Case Synopsis

In July of 2023, Johnson & Johnson (J&J) announced its final step in its plan to divest its interest in Kenvue, a division that owned J&J's consumer health business. J&J offered a stock exchange of Kenvue shares for J&J shares. After the stock exchange, J&J and Kenvue would be independent. Before the exchange, J&J owned 80% of Kenvue. Students will explore several questions in this case. First, why was J&J exchanging shares, rather than more conventional methods of accomplishing the same goal, including selling or spinning off Kenvue? Second, students will explore the question: As a shareholder what should you do? Third, to answer that question, it would be important for students to analyze how the share exchange may impact J&J stock price and Kenvue's stock price. In order to answer these questions, an estimate of Johnson and Johnson's (J&J) stock price without Kenvue is needed. An estimate of Kenvue's stock price after the exchange is also needed.

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 2024 Conference, Orlando, Florida, USA, October 17-19, 2024. © 2024 by Susan White and Karen Hallows. Contact person: Susan White, University of Maryland, suwhite@umd.edu.

HINDENBURG RESEARCH & THE ADANI GROUP (2023)

Vishwanatha S.R., Mahindra University, India
Vijaya Zinnoury, University of Denver
Durga Prasad, Manipal University
Srinija Kallakuri (student author), Mahindra University

Case Objectives and Use

The case is appropriate for undergraduate and graduate courses in:

- Corporate Finance and
- Corporate Governance.
- Instructors may also use it in a Securities Markets or Valuation course.

Topics Covered: Conglomerates from high-growth emerging markets; Activist investor firms' goals and activism; Financial valuation.

Case Synopsis

On January 24, 2023, Hindenburg Research, a U.S based activist short selling research firm, had published a scathing report on the Adani Group of India, one of the largest business conglomerates in India (and Asia). At that time, the Adani group of India had a market valuation of more than \$200 billion and Adani's family had an accumulated wealth of over \$120 billion. The Hindenburg report raised concerns about governance at Adani, a large, family-owned, conglomerate in a fast-growth emerging market. Students are asked to analyze governance problems within the Adani group, opportunities and risks to investor activism and mechanisms to address concerns about corporate governance.

Adani Enterprises (AEL) was in the midst of a stock offering on January 27, 2023, when the report was released. The report suggested that Adani firms, including AEL, were grossly overvalued and had several corporate governance issues. Students are asked to step into the shoes of founder, Mr. Gautam Adani, and decide how to respond to the report released by Hindenburg Research and whether Mr. Adani should move forward with the planned AEL stock offering.

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 2024 Conference, Orlando, Florida, USA, October 17-19, 2024. © 2024 by Vishwanatha, Zinnoury, Prasad, and Kallakuri. Contact person: Vijaya Zinnoury; e-mail: Vijaya.Zinnoury@du.edu.

LAGOM DESIGN SHOPS: THE EXCLUSIVE EDGE

Alexander Miller, Huron at Western University
Lauren Nicolaas, Huron at Western University

Case Objectives and Use

This is a managerial accounting and financial management case. This case is best employed towards the end of a unit of study in financial analysis. It is set at an introductory, undergraduate level. It features the following learning opportunities:

- 1) Historical financial analysis: including the analysis of a statement of cash flows, ratio analysis, and opportunities to contextualize financial results.
- 2) Differential analysis – including how to factor in sales cannibalization and sunk costs.
- 3) Business strategy decision making.

Case Synopsis

Thelma Obomsawin must provide a recommendation for Laurie Severn and Pere Armengol for their Scandinavian style furniture and decor business - Lagom Design Shops. The business has overcome some of the challenges presented by the COVID-19 global pandemic and has found an opportunity to be brand representatives / distributors for a number of European suppliers with whom they have close relationships. Obomsawin must analyze the opportunity and provide a recommendation to Severn and Armengol.

The case takes students through the history of Lagom Design Shop and encourages them to analyze what has driven Lagom's success in the past. Students will also identify key success factors in the industry and discuss how they influence the decision that Obomsawin must make. They will then use this knowledge from their business size up to contextualize the statement of cash flows and ratio figures.

Students will perform a high/low differential analysis and project high/low financial statements. This case illustrates the differences between these two financial analysis tools nicely.

Finally, if a thorough analysis is performed, students should have a hard time deciding what to do. The high scenario looks very rewarding whereas the low scenario looks somewhat daunting. Furthermore, the qualitative size up performed should have provided many qualitative pros and cons to pursuing this opportunity. This leads to productive classroom discourse, and emphasizes the importance of performing a balanced analysis and making a clear decision.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2024 Conference, Orlando, Florida, USA, October 17-19, 2024. © 2024 by Alexander Miller and Lauren Nicolaas. Contact person: Lauren Nicolaas, Huron at Western University, 1349 Western Rd, London, ON N6G 1H3, +1-519-200-2757, lnicolaa@uwo.ca.

DRAKKO: A BUMPY RIDE

Juan Pablo Dávila, Inalde Business School, Universidad de la Sabana
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Javier Tovar, Inalde Business School, Universidad de la Sabana

Case Objectives and Use

This case was developed for MBA and Executive Education programs. It is suggested for use in courses on the fundamentals of risk management, particularly in either at the beginning of the risk management module for an MBA program or as the initial session on risk in an executive education program.

After discussing this case, participants will be able to:

1. Review a systematic risk management process from listing all risks to building a risk matrix.
2. Be able to connect possible materialization of risks to impact on financial results.
3. Evaluate results by using scenario analysis.

Case Synopsis

The case is set in March 2022 in Cali (Colombia). The protagonist, Carlos Pérez, Project Manager for Cali's Adventure Amusement Park, must present a recommendation to the board of directors on whether to invest in a secondhand roller coaster as a new attraction. A Public Private Partnership contract with the city government requires the park operators to include new attractions during the duration of the contract (25 years). Anaconda, the prospective new roller coaster's price is 3,5 M USD, considerably lower than the price for a new one. However, some issues must be considered, such as disassembly in its current location, transportation, and assembly and setup at the park in Cali. An initial analysis shows attractive numbers, but Carlos and Alejandro (General Manager) wonder if something is missing. Students are invited to identify risks, put them in a risk matrix, and do the analysis using a risk management methodology.

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 2024 Conference, Orlando, Florida, USA, October 17-19, 2024. © 2024 by Juan Pablo Dávila, Alvaro Moreno and Javier Tovar. Contact Person: Juan Pablo Davila, INALDE Business School. Campus Universidad de La Sabana, Km. 7, AutoNorte, Chia, Colombia, +578614444, juan.davila@inalde.edu.co.

MOSTLY MENTAL SHUTTLES: A NEW BEGINNING

Wayne Singular, Thompson Rivers University

Case Objectives and Use

This case focuses on the essential cash flow management skills and insights common to businesses. Cash flow management is especially critical to small businesses that are balancing personal and business objectives simultaneously. This intermediate level case is suited for 2nd or 3rd undergraduate managerial accounting, finance or entrepreneurship courses. Based on real-world business operations and capital acquisition decisions it requires students to utilize operating income modeling and forecasting techniques and to consider nonfinancial factors. Students are asked to analyze and provide direction on strategic matters including adding employees and timing recommendation for equipment replacement.

Case Synopsis

Mostly Mental Shuttles is a Kamloops, British Columbia based transportation company owned and operated by Brian Holly and Tammy Leary specialized in shuttling mountain bike riders and equipment in Kamloops, British Columbia, Canada and the surrounding area. Holly and Leary purchased the business from the original founder Dylan Methot in October 2021.

In February 2024 they reflected on their operations for the previous two year period where they have reasonably maintained the existing shuttle operations as owner operators. While expenses continuously increased during these periods, revenues did not. Were they restricted by the individual ticket and pass prices that had not been increased since 2019? Also, shuttle operations were limited by the number of hours they could personally drive. Was rider demand enough to hire employee drivers to assist? Finally, should the current 9 year old shuttle vehicle be replaced with a similar, newer and more reliable unit?

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 2024 Conference, Orlando, Florida, USA, October 17-19, 2024. © 2024 by Wayne Singular, MBA, CPA, CMA. Contact person: Wayne Singular, Thompson Rivers University, Kamloops, British Columbia, Canada 1.250.377.6176 wsingular@tru.ca.

REAL ESTATE INVESTMENT ANALYSIS: HYATT HOUSE

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Case Objectives and Use

This finance case is targeted at Real Estate and Business Courses at the Graduate and Executive Graduate level. The issues addressed in this case are Market and Location Analysis, Capital Structure and Funding, Implementation Challenges, Project Execution, Debt and Financing Structure, as well as Property Condition and required improvements.

The case would be suitable for the middle of a course, once students have been introduced to the various components that each need to be incorporated into the investment memorandum. Students using this case would be expected to already understand typical loan terms and conditions for a property of this size as well as typical expectations of investors in such properties in order to estimate the targeted amounts of equity and debt that would be used to acquire and renovate such a property. This information is also provided in the exhibits and the attached excel file template.

Students must grapple with a number of specific objectives for the renovation of the property ranging from fundamental issues with the physical status of the existing building such as the leaking roof and windows to the overall approach towards management of the property and which kind of tenants (market or voucher) to retain and/or attract over the long term. Should the analyst, for example, recommend the conversion of existing one bedroom to two-bedroom units and/or the investment in roof and window repairs? How best to manage 4 existing tenants who each owe \$10,000 in past rent and are refusing to pay this debt until repairs are made?

Case Synopsis

EE LLC is a leading real estate development and management firm based in Washington, D.C. The case involves the acquisition and evaluation of an 18-unit value-add multifamily residential property located at 5103 43rd Ave, Hyattsville, MD. The property currently has high vacancy and needs multiple capital improvements. It also offers opportunities for upgrades to achieve sustainability goals. The issues that the protagonist, a young analyst, faced in Q1 of 2024 were whether to recommend purchasing this investment property and how best to proceed in order to profit off of this investment. The case study provides many hints and suggestions yet the student must pick which way to proceed when completing the assignment. Students must decide whether or not to invest at all, and if they do go ahead with the investment, which improvements to make and whether or not to convert some or all of the apartments to section 8 vouchers.

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 2024 Conference, Orlando, Florida, USA, October 17-19, 2024. © 2024 by Felipe Ernst. Contact person: Glenn Williamson, Georgetown University, School of Continuing Studies, 640 Massachusetts Avenue NW, Washington, DC 20001, (202) 256.3922, glenn.williamson@georgetown.edu.

FROM INFORMALITY TO GROWTH: CHALLENGES IN THE ACCOUNTING PRACTICES OF A PERUVIAN CORNER STORE OWNER

Gloria Maria Zambrano Aranda, Pontificia Universidad Católica del Perú
Luis Demetrio Gómez García, Pontificia Universidad Católica del Perú
Emerson Jesús Toledo Concha, Pontificia Universidad Católica del Perú

Case Objectives and Use

This case is suited for undergraduate students in accounting. The case can be applied in courses on Basic Financial Accounting, Intermediate Financial Accounting, Advanced Financial Accounting, Accounting Information Systems, and Accounting Taxation. Additionally, the case can be applied in courses on entrepreneurship, management and control, leadership, and strategic planning. The teaching notes presented in this document primarily focus on courses related to Financial Accounting at an undergraduate level. Upon completing the case study, students will be able to:

1. Evaluate the negative impact of informality in accounting and control systems on the growth aspirations of entrepreneurs.
2. Propose the structure of an accounting system for a business, based on IFRS for SMEs and the business characteristics.
3. Select the appropriate computerized accounting system for a small commercial business, based on cost-benefit criteria of such applications, and outline guidelines for its implementation.
4. Propose the profile of an accountant for a small commercial business, based on professional, ethical, and customer-oriented criteria.

Case Synopsis

This case study examines the entrepreneurial trajectory of María Sanabria, a Peruvian entrepreneur who has transformed a modest fruit stand on a street corner in Ventanilla, Lima, into a thriving corner store with significant revenue for the year 2024. María is an ambitious entrepreneur skilled at attracting and maintaining a loyal clientele, demonstrating her capability to grow a business from a basic level to a considerable size. However, despite her apparent success and accelerated growth during the pandemic, she faces critical challenges due to the informality of her business and accounting practices. Although María knows how to manage and expand her customer-facing business, she lacks the necessary knowledge to understand the financial profitability of her business, confusing key concepts such as net cash flow, profit, and profitability. Moreover, this case exposes the barriers that informal accounting practices impose on her aspiration to transform her corner store into a medium-sized supermarket.

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HOW CAN SHE MAKE A LEGITIMATE REAL ESTATE PURCHASE OFFER IN A NON-DISCLOSURE STATE?

Charles Hilterbrand, University of Mississippi
Sergio Gárate, Emory University
Violetta Davydenko, University of Mississippi

Case Objectives and Use

This case is designed for real estate classes at the undergraduate and graduate level. The IM contains a discussion of the legal distinction between disclosure and non-disclosure states and it could also be presented in a real estate law class. It is also a case that describes steps that can be taken to appraise the value of a property. This case could also be used outside of the university setting as a practical instruction to the appraisal industry.

Case Synopsis

In April, 2022, a mother searched for a house for her son who intended to attend graduate school in the fall. Real estate prices were soaring at the time of the search. Property demand resulted in sales prices more than asking prices and properties went under contract on the same day as listing. A change of strategy by the mother to begin a letter writing campaign resulted in finding a couple willing to show their condominium in advance of listing their property with a real estate agent. As the mother performed a cursory search of the property, she discovered that she lived in a non-disclosure state and that prior real sales information was prohibited from being disclosed on public record. While she liked the house, she was unsure of how to value the property. If she had to make an offer fast as the sellers planned to meet with a real estate agent the next morning to list the property.

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Cases Written in Chinese Language

Track Chair: William Wei, Algoma University
Co-Chair: Haibo Hu, Jiangxi University of Finance and Economics

Session Chair: William Wei

Friday Only

Cases

Kweichow Moutai in Canada: Cultural Mixing Marketing

Insurance Donations: ESG Innovations or Marketing Strategy?

Win-Win or Loss-Loss: The Merger and Acquisition of Suning
Tesco and Carrefour

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KWEICHOW MOUTAI IN CANADA: CULTURAL MIXING MARKETING

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Case Objectives and Use

This case study aims to guide students in understanding the motivations, pathways, mechanisms, and risks of cultural mix-and-match marketing by analyzing how Sinocan Supply Inc. helped Moutai enter the Canadian liquor market. On this basis, students will also develop their skills in information extraction and rational decision-making.

POSITION IN COURSE

This case is primarily applicable to the teaching of theoretical concepts related to “cultural mixing” in the “cultural marketing” chapter of a marketing course.

Case Synopsis

Established in 2012, Canada Sinocan Supply Inc. is a Canadian agent for more than a dozen Baijiu brands in China, and focuses on providing consumers with high-quality Chinese Baijiu while promoting Chinese liquor culture.

This case describes how Ma Junqiang, Chairman of Sinocan Supply Inc., used cultural mixing marketing as a strategy to help Moutai enter the Canadian liquor market. In cross-cultural enterprise operations, cultural mixing enabled Sinocan Supply Inc. to expand the Chinese Baijiu market, as represented by Moutai, within the Canadian liquor industry. Through a series of marketing activities, the company presented Moutai’s brewing technology, development history, and brand culture to Canadian consumers, thereby achieving a unity of economic, social, and ecological values for the brand.

The case focuses on the origins and strategies involved in Moutai’s entry into the Canadian liquor market, in order to deepen students’ understanding of cultural mixing theory while helping them acquire marketing knowledge and skills.

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INSURANCE DONATIONS: ESG INNOVATIONS OR MARKETING STRATEGY?

Robert Xu, Algoma University
Yijun Liu, Renmin University of China

Case Objectives and Use

This case is ideal for courses focused on strategic management, marketing, and corporate social responsibility (CSR), specifically within the context of the insurance industry. It targets undergraduate and MBA students, equipping them with insights into Environmental, Social, and Governance (ESG) practices and their intersection with marketing strategies. Students will develop analytical skills to evaluate corporate ESG initiatives, understand the role of insurance in societal risk management, and critically assess the balance between corporate social responsibility and business objectives. The case challenges students to debate whether corporate insurance donations during crises like the COVID-19 pandemic are genuine ESG innovations or strategically disguised marketing tactics.

Case Synopsis

The case, set against the backdrop of the COVID-19 pandemic (2020-2022), examines Ping An Insurance's philanthropic initiatives in China. It highlights the company's comprehensive insurance donations to frontline workers, vulnerable populations, and society at large during the crisis. These actions ranged from donating large-scale accident insurance policies to innovating new products like vaccine-related coverage. While the initiatives bolstered Ping An's public image and brand trust, they also sparked debate about the underlying motivations—whether driven by altruistic ESG commitments or calculated marketing strategies.

Through detailed analysis, the case explores the dual impacts of these donations: enhancing the resilience of individuals and communities while generating long-term customer loyalty and business growth. The study also delves into the theoretical underpinnings and motivations, including stakeholder theory, resource dependency theory, and strategic philanthropy. It concludes by inviting students to discuss the regulatory challenges, risks, and future implications of such actions on the insurance industry's role in sustainable 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 were anonymously peer-reviewed for presentation at the NACRA 2024 Conference, Orlando, Florida, USA, October 17-19, 2024. © 2024 by Robert Xu and Yijun Liu. Contact person: Robert Xu, Algoma University, 1520 Queen St E, Sault Ste. Marie, ON P6A 2G4, Canada, robert.xu@algomau.ca.

共赢还是共输：苏宁易购与家乐福的并购之路

张燕 上海立信会计金融学院
程新章 上海立信会计金融学院
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案例目标和运用

本案例主要用于《国际商务谈判》、《战略管理》、《企业并购研究》、《风险管理》等课程的教学，适用于经济学专业和管理学专业的本科生、MBA、EMBA 的学生、以及企业中高层管理人员培训使用。

通过分析企业并购谈判的动因，分析谈判类型、谈判目标和谈判策略，企业商务谈判过程中双方可能面临的冲突和风险，采取何种策略和方法处理冲突、防范风险，本案例的教学有助于学生发展国际商务谈判的能力、培养学生分析和解决谈判冲突的能力、学生防范和控制风险的能力。

Case Synopsis

2019年03月—2019年06月期间

苏宁易购管理层面临的风险：信息不对称的风险

苏宁易购谈判方面面临的问题是：和家乐福进行并购谈判，收购家乐福（中国）的价格水平、怎样并购家乐福（中国）？

家乐福集团管理层考虑的问题是：中国零售业竞争日益激烈，如何退出中国市场？

家乐福集团谈判方面面临的问题：如何回应苏宁易购的并购计划？一次性并购和多次并购的优劣？并购家乐福（中国）之后，家乐福（中国）以何种方式生存下去？

谈判结果：苏宁国际向 Carrefour Nederland B.V. 以现金 48 亿元人民币等值欧元收购家乐福中国 80% 股份。收购日后满 2 年的 90 天内将所持有的剩余 20% 家乐福中国股权，按照协议约定的固定价格转让给苏宁国际，苏宁国际需无条件购买。

2019年9月—2022年04月

苏宁易购管理层面临的风险包括：行业波动风险、并购整合风险

家乐福管理层面临的风险：关店风险、财务风险、经营风险

2022年05月—2022年12月

苏宁易购谈判方面面临的问题：就剩余家乐福（中国）股权 20% 的收购，如何与家乐福谈判代表沟通？

家乐福集团谈判方面面临的问题：如何尽快回收 20% 股权资金？

2023年05月后

苏宁易购管理层面临的风险和问题包括：整合风险，如何与家乐福集团进行进一步谈判？

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 2024 Conference, Orlando, Florida, USA, October 17-19, 2024. © 2024 by Yan Zhang. Contact person: Yan Zhang, zywg0608@163.com, Shanghai Lixin University of Accounting and Finance.

Cases Written in Portuguese Language

Track Chair: Tania Casado, University of São Paulo

Co-Chair: Erica Berte, Metropolitan State University

Session Chair: Tania Casado

Friday Only

Cases

Elipse: uma decisão nas nuvens

Do berço à liderança: a maioria de uma mulher e de um negócio

O Habib's e a Difícil Conquista da América

Authors

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Tania Casado

Rodrigo Gallo
Tania Casado

ELIPSE: UMA DECISÃO NAS NUUVENS

Ricardo Engelbert, ISE Business School
Eugenio Mattioli Gonçalves, ISE Business School
Fabio Costa Barbosa, ISE Business School

Case Objectives and Use

This case is suitable for use in courses on strategy, digital strategy, IT strategy, innovation, and operations at the postgraduate, MBA, and executive education levels. Its main learning objectives involve:

- Understanding Business Models and Innovation.
- Partnership Strategies and Business Ecosystem.
- Revenue Model Evaluation.
- Understanding Digital Transformation.
- Organizational Change Management.
- Risk Analysis and Decision Making.

Case Synopsis

In February of 2024, Alexandre and Ricardo, COO and CEO of Elipse Software Ltda, a Brazilian software company specializing in industrial automation software, are considering migrating one of their main products to cloud computing. The potential client's request for a cloud solution proposal has prompted internal discussions about the feasibility and implications of this migration. Elipse's products, including HMI and SCADA packages, are crucial for monitoring and controlling industrial processes in various sectors.

The migration to the cloud is seen as a significant milestone for Elipse and requires not just technical considerations, but also deep organizational discussions about the future of the company's business in the digital environment. The technical team has proposed several options, ranging from hybrid solutions to full cloud adoption, including the creation of a new Elipse Cloud service and offering fully cloud-based solutions focused on IoT and monitoring applications.

The executives are now faced with a dilemma that many in the IT sector encounter: how to balance technological innovation with preserving their existing business model.

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 2024 Conference, Orlando, Florida, USA, October 17-19, 2024. © 2024 by Ricardo Engelbert, Eugenio M Gonçalves and Fabio C Barbosa. Contact person: Ricardo Engelbert, ISE Business School, Rua Martiniano de Carvalho, 573 – São Paulo, SP, Brazil, +5511963902010, ricardo.engelbert@ise.org.br.

DO BERÇO À LIDERANÇA: A MAIORIDADE DE UMA MULHER E DE UM NEGÓCIO

Aparecido Borghi, Instituto Mauá de Tecnologia
Tania Casado, Universidade de São Paulo - FEA/USP

Case Objectives and Use

Indicado para as disciplinas de Administração de Compras, Gestão de Materiais, Gerenciamento de Estoques e especificamente para o público de graduação e especialização. Os objetivos de aprendizagem incluem conhecimentos sobre a relação dos estoques, o nível de serviço oferecido e o fluxo financeiro nas decisões corporativas. Além disso, os alunos devem desenvolver habilidades para analisar o impacto das decisões de compras nos estoques e na empresa, bem como promover atitudes de pensamento crítico para a construção de cenários e a tomada de decisões entre alternativas.

O estudo de caso é baseado em um caso real, porém utiliza nomes fictícios para garantir a confidencialidade. Os dados primários foram coletados através de entrevistas semiestruturadas com a protagonista, além de funcionários e gestores da empresa. Dados secundários foram obtidos em relatórios de Associações Comerciais, publicações de circulação livre e websites, garantindo uma base sólida de informações para a análise. A teoria e os conceitos relacionados abordados: Administração de Materiais, a Gestão de Compras e o Gerenciamento de Estoques.

Case Synopsis

Glória se deparou com dois caminhos claros para melhorar a eficiência da Pet Clinique. A primeira opção seria a profissionalização interna, com a criação de processos estruturados e treinamentos adequados, o que poderia resultar em uma melhoria significativa, mas demandaria um investimento inicial em tempo e recursos. A segunda opção seria terceirizar as compras para uma central de compras, visando redução de custos e maior eficiência com investimento inicial reduzido, porém requerendo confiança em parceiros externos e adaptação cultural interna. Com o crescimento da empresa, ela percebeu a necessidade de adotar conceitos de administração, especialmente nas compras de insumos, que representavam uma oportunidade significativa de melhoria, dada a gestão de 540 itens diretos com perecibilidade e custos elevados.

Durante suas investigações, Glória entrevistou Pedro Cardoso e Magda Lemos, responsável pelas principais envolvidas, e identificou algumas oportunidades. Ela concluiu que os excelentes profissionais estavam na empresa desde o início, porém careciam de ferramentas de gestão para compreender os impactos globais de suas decisões. Além disso, Glória entrevistou Anderson Xavier, um executivo de uma Central de Compras, que estava organizando um consórcio de empresas do ramo veterinário para oferecer serviços na região.

Ambas as opções tinham vantagens e desafios. A decisão final deveria considerar não apenas os custos imediatos e potenciais economias, mas também a manutenção da qualidade dos serviços, que eram a marca registrada da Pet Clinique. Glória precisava ponderar cuidadosamente esses fatores antes de apresentar sua proposta aos sócios gestores na próxima reunião.

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O HABIB'S E A DIFÍCIL CONQUISTA DA AMÉRICA

Rodrigo Gallo, Instituto Mauá de Tecnologia
Tania Casado, Universidade de São Paulo

Case Objectives and Use

O caso pode ser utilizado em cursos de graduação da área de negócios, em especial Administração, Relações Internacionais e Economia, bem como em aulas de pós-graduação e MBA. Idealmente, o caso pode ser adotado por professores(as) que lecionam disciplinas cujas competências envolvam internacionalização de empresas, tomada de decisão e análise de conjuntura política/risco político.

Case Synopsis

O caso, baseado em uma situação corporativa real vivenciada por uma empresa brasileira do ramo de *fast food* e seu fundador Alberto Saraiva, é um bom exemplo para discutir o impacto dos grandes eventos internacionais para a tomada de decisão empresarial. No início dos anos 2000, a empresa Habib's elaborou um amplo plano de internacionalização, cuja proposta era expandir a rede para o México e para os Estados Unidos, dois promissores mercados consumidores. O projeto original envolvia a abertura de seis lojas em território mexicano, em 2001, e posteriormente a ampliação do número para 150 em até cinco anos, além de criar lanchonetes em grandes cidades norte-americanas – um dos maiores mercados de *fast food* do mundo. A primeira unidade estava prevista para ser inaugurada em Los Angeles.

Esse processo enfrentou uma série de problemas, tanto no México quanto nos Estados Unidos, que possibilitaram compreender a importância das Relações Internacionais para a gestão de negócios e para o processo de tomada de decisão empresarial - e, conseqüentemente, a importância de estudar os riscos internacionais de forma mais adequada: risco comercial, intercultural, cambial e risco-país, por exemplo.

Ao descrever a trajetória dessa etapa da internacionalização do Habib's para os Estados Unidos à luz da conjuntura dos ataques ao World Trade Center, é possível compreendermos os dilemas enfrentados pelo protagonista, um empresário brasileiro interessado em levar sua rede para um amplo mercado consumidor. A partir das perspectivas analíticas de internacionalização de empresas – em especial o conceito de risco-país –, o caso mostra a importância de analisar criteriosamente não apenas os aspectos técnicos, logísticos e econômicos do processo, mas também a conjuntura política e geopolítica, um conhecimento ainda pouco comum para gestores brasileiros.

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 2024 Conference, Orlando, Florida, USA, October 17-19, 2024. © 2024 by Rodrigo Gallo. Contact person: Rodrigo Gallo, Instituto Mauá de Tecnologia, Praça Mauá, 1 – São Caetano do Sul – SP, (5511) 97610-9401, rodrigo.gallo@maua.br. Tania Casado, Faculdade de Economia, Administração, Contabilidade e Atuária da Universidade de São Paulo (FEA/USP).

Cases Written in Spanish Language

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

Co-Chair: Lorena Andrea Palacios Chacón, Tecnológico de Monterrey

Session Chair: Josep Lluís Cano Giner

Friday Only

Cases

Wellcome: Marketing Estratégico en Entornos Complejos

Internacional de Diagnostico: Descentralizando El Diagnóstico de Enfermedades Infecciosas

Accompanying and Educating: IRMA's Path in Addressing Gestational Loss

Caso La Inteligencia Artificial en M4D.Clinic

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WELLCOME: MARKETING ESTRATÉGICO EN ENTORNOS COMPLEJOS

Ernesto Barrera, INALDE Business School (Universidad de La Sabana)
Xavier Cárdenas, INALDE Business School (Universidad de La Sabana)

Case Objectives and Use

Los objetivos de aprendizaje del caso:

- Evaluar estrategias de crecimiento y expansión en un entorno competitivo y con regulación ambigua.
- Analizar el impacto de las regulaciones y políticas locales en el modelo de negocio de una *startup*.
- Desarrollar estrategias de marketing y gestión de marca para mejorar la posición competitiva.
- Proponer soluciones para la gestión de conflictos y tensiones con *stakeholders* y mejorar la satisfacción del cliente.
- Determinar los pros y contras entre un crecimiento acelerado en ventas vs. un crecimiento orgánico enfocado en rentabilidad.
- Identificar los *trade-offs* que tiene un emprendimiento en etapa temprana en decisiones entre buscar un foco de negocio versus necesidades de crecimiento y expansión.
- Introducir el concepto de RevPAL e identificar los KPI's críticos en rentas cortas, y compararlo con otras métricas en sector hotelero como RevPAR.

Este caso ha sido diseñado para ser utilizado en asignaturas de EMBA en Marketing Estratégico, Emprendimiento y Dirección General. Su uso también es recomendable en programas *incompany* para empresas que forman a sus directivos en competencias de *intra-emprendimiento* y en el campo de las PropTech.

Case Synopsis

Para mediados de 2024, Wellcome, PropTech en la categoría de rentas cortas, ha realizado cambios estratégicos enfocándose en propiedades de mayor rentabilidad y optimizando la logística. A pesar de enfrentar una disminución en la tasa de crecimiento de la categoría, la empresa busca diversificar sus clientes ofreciendo estadías prolongadas y penetrando mercados corporativos. La empresa ha renunciado a propiedades de baja rentabilidad y ha mejorado su eficiencia operativa mediante la centralización de compras y el uso de tecnología. Entre los principales retos se encuentran la formalización de la industria y la gestión de relaciones con administraciones de propiedades horizontales que a menudo se oponen a las rentas cortas. Además, la empresa enfrenta una competencia creciente de anfitriones informales y la necesidad de profesionalizar el sector para mejorar la percepción y aceptación de esta modalidad de alojamiento. Wellcome también está explorando oportunidades de expansión internacional y nuevos servicios a constructores y fondos inmobiliarios. Wellcome está en una encrucijada entre continuar su crecimiento acelerado o enfocarse en la rentabilidad a corto plazo. La empresa necesita equilibrar la expansión con la gestión eficiente de recursos y la optimización de ingresos para lograr una valoración atractiva para futuros inversionistas.

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 2024 Conference, Orlando, Florida, U.S., © by Ernesto Barrera y Xavier Cárdenas. Contact person: Ernesto Barrera Duque, INALDE Business School (Universidad de La Sabana), Autopista Norte Km. 7, Costado Occidental, Bogotá, Colombia, +57-315-2203199, ernesto.barrera@inalde.edu.co.

INTERNACIONAL DE DIAGNOSTICO: DESCENTRALIZANDO EL DIAGNÓSTICO DE ENFERMEDADES INFECCIOSAS

Juan Manuel Vicaría, (faculty supervisor) INALDE Business School
Diego Valbuena (student author) INALDE Business School

Case Objectives and Use

Este caso está diseñado para ser usado en programas de marketing estratégico, específicamente en aquellos que requieran tratar el tema de estimaciones de mercado. Puede ser usado en el segundo año de un MBA ejecutivo o en otros programas de executive education. Puede ser de especial interés para compañías del sector de la salud, si bien puede ser adecuado para cualquier audiencia ejecutiva con conocimientos básicos de marketing como segmentación, targeting y posicionamiento. El caso está ambientado en el sector de la salud en Colombia. Dada la estructura del sistema el caso plantea las dificultades propias de determinar quién es el cliente, quien el usuario y quien el pagador de los servicios. Los estudiantes desarrollarán en este caso la habilidad de dimensionar mercados en entornos complejos.

Case Synopsis

El caso se desarrolla en enero de 2024. Los hechos tienen lugar en Colombia, en la filial local de una compañía multinacional de equipos de laboratorio para diagnóstico clínico. El caso describe la decisión que debe tomar su gerente general, Antonio Bolívar, sobre el dimensionamiento del mercado de pruebas diagnósticas en el punto de atención (point of care). Los hechos están enmarcados en el sistema de salud pública de Colombia, que por la complejidad de su estructura dificulta la toma de decisiones de marketing, especialmente la determinación del tamaño de mercado.

A un nivel más amplio, el caso está enmarcado en un problema global que es la resistencia a los antimicrobianos (antibióticos). El uso descuidado de estos medicamentos ocasiona que se vuelvan ineficaces para el tratamiento de enfermedades infecciosas y que las infecciones persistan en el organismo, lo que incrementa el riesgo de muerte para el paciente y de propagación a otras personas. Los equipos de diagnóstico en el punto de atención le dan al médico los criterios suficientes para usar adecuadamente los antimicrobianos, por lo que este caso trata también de la solución a un problema global presente en las primeras décadas de este siglo.

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 2024 Conference, Orlando, Florida, USA, October 17-19, 2024. © 2024 by Juan Manuel Vicaria and Diego Balbuena]. Contact person: Juan Manuel Vicaría, INALDE Business school, Autonorte km 7 costado occidental, (573)175110402, juan.vicaria@inalde.edu.co.

ACCOMPANYING AND EDUCATING: IRMA'S PATH IN ADDRESSING GESTATIONAL LOSS

Karina Isabel Salinas Solís, Universidad Autónoma de Baja California
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Natanael Ramírez Angulo, Universidad Autónoma de Baja California

Case Objectives and Use

This case is designed for strategic management, social entrepreneurship, and nonprofit organization management courses at the graduate level (MBA and Master's in Social Business). It addresses topics such as financial sustainability, income diversification, and the ethical and strategic dilemmas faced by civil society organizations.

By discussing this case, students will develop:

1. Analytical skills to evaluate the feasibility of different financial models.
2. Strategic capabilities to balance social and financial objectives.
3. Critical understanding of the unique challenges faced by organizations operating in vulnerable environments.

Case Synopsis

In **2023**, Mari Carmen Alva, founder of the Institute for the Rehabilitation of Women and Families (IRMA) in Mexico City, faces a crucial dilemma regarding the sustainability of her organization, which has been offering emotional support to families experiencing gestational loss for nearly 25 years.

IRMA was originally based on in-kind donations and volunteer work. However, the increasing demand for services has exceeded its operational capacity. Mari Carmen must decide whether to implement a fee-based model to ensure financial stability without compromising the organization's social mission.

This case invites students to analyze income diversification strategies and financial sustainability within the context of an organization operating in a highly challenging environment.

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 2024 Conference, Orlando, Florida, USA, October 17-19, 2024. © 2024 by Karina Isabel Salinas Solis, German Osorio Novela, Natanael Ramirez Angulo. Contact person: Karina Isabel Salinas Solis, karina.salinas@uabc.edu.mx, Universidad Autonoma de Baja California.

CASO LA INTELIGENCIA ARTIFICIAL EN M4D.CLINIC

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

Case Objectives and Use

Los objetivos de aprendizaje del caso:

1. Comprender cómo la automatización de los procesos (robot process automation, RPA), el aprendizaje automático (machine learning, ML) y la IA generativa (GenAI) pueden utilizarse en M4D.
2. Identificar los distintos proyectos en que M4D puede aplicar la inteligencia artificial y describir alguno de ellos utilizando la metodología de “The AI canvas”.
3. Examinar los impactos que puede tener la adopción de cada uno de los proyectos en los de procesos, las personas (internas y externas) y la tecnología.
4. Crear un portafolio de los distintos proyectos estableciendo las tecnologías adecuadas (RPA, ML, GenAI), y los criterios de selección y de secuenciación de los distintos proyectos.
5. Evaluar las necesidades y las capacidades que debe tener M4D para lanzar los pilotos y escalar los proyectos.

Este caso ha sido diseñado para ser utilizado en asignaturas de posgrado de Operaciones, Innovación o Transformación Digital. Puede utilizarse con estudiantes de MBA de diferentes perfiles y con distintos años de experiencia (a jornada completa, a tiempo parcial o en formato de *Executive MBA*) y en programas ejecutivos, tanto abiertos como *In-Company Training* (ICT).

Case Synopsis

Corría el mes de noviembre de 2022. El Dr. Pradera, fundador y director de Management for Doctors (M4D), había de tomar una decisión sobre cómo abordar el uso de la inteligencia artificial (IA) en M4D.clinic y sabía que los responsables de cada una de las áreas de M4D tenían visiones distintas. El mercado y los competidores evolucionaban rápidamente, por lo cual no podían demorarse en tomar la decisión, pues había de formar parte del plan de acción del ejercicio 2023. El encargo que tenía que hacer a Rafel Montané, su director de Tecnologías de la Información y de la Comunicación, era muy concreto: debería proponer un plan de acción que priorizara en qué áreas de M4D.clinic y sobre qué funcionalidades se tendría que aplicar la IA. Los recursos eran limitados, por lo que se le pedía que agrupara estas funcionalidades en tres fases, que coincidirían con los planes de acción de los ejercicios 2023 a 2025.

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 202 Conference, Orlando, Florida, 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, joseplluiscano@esade.edu.

Cases Written in French Language

Track Chair: Christine Kratz, ICN Business School

Co-Chair: Sabrina Hombourger-Barès, École des sciences de l'administration Université TÉLUQ

Session Chair: Christine Kratz

Cases

Netflix, un entrant potentiel qui a crevé l'écran!

La coopérative apicole Idboustia: reconquérir le marché marocain par l'authenticité et la confiance

Ajabane Lamta (Les Fromages de Lamta): quelle stratégie de communication pour commercialiser une nouvelle marque de fromage à base de lait de chamelle

Fromagerie Donge: quels relais de croissance pour préparer une relève familiale responsable?

Authors

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NETFLIX, UN ENTRANT POTENTIEL QUI A CREVÉ L'ÉCRAN !

Ernest Kuekam, Université d'Ottawa

Stéphane Gagnon, Université du Québec en Outaouais

Objectifs du cas et utilisation

Il s'agit d'un cas analytique et décisionnel qui permet aux professeurs de naviguer entre théorie et pratique grâce à une entreprise technologique d'envergure internationale. Ce cas permet aussi aux étudiant.e.s de réaliser les apprentissages pratiques en élaborant un plan de marketing digital (PMD), qui réponde aux attentes des cours de marketing digital, marketing et technologies numériques et commerce électronique de niveau universitaire. Les étudiant.e.s réalisent l'intégration des apprentissages en classe ou en ligne selon le modèle de PMD. Ce modèle préconisé, propose une analyse de la situation renforcée avec pour base l'environnement digital, une détermination singulière des objectifs (les 5S), une élaboration des stratégies fondamentales digitales qui sous-tendent les tactiques, donc les stratégies opérationnelles (mix marketing digital), puis une affectation des ressources et compétences internes aux activités détaillées en termes d'actions, ainsi qu'un contrôle avec les outils numériques, dont les métriques.

Le cas présente l'entreprise Netflix, comme un nouvel entrant dans un marché traditionnel aux États-Unis (industrie cinématographique). Il décrit comment celle-ci bouleverse la joute et s'impose avec des produits et services technologiques innovants. Par ailleurs, elle fait face à un environnement externe incontrôlable. Ainsi, le microenvironnement (clients, marché, concurrence et fournisseurs) et le macroenvironnement (PESTEL) sont dominés par des variables versatiles et complexes. Les étudiant.e.s doivent en tenir compte dans leurs analyses et décisions.

Le cas s'adresse aux étudiant.e.s des fins de premier et deuxième cycle des programmes de gestion, option marketing, des niveaux licence et master des pays francophones, baccalauréat et maîtrise en administration des affaires (BAA et MBA) de l'Amérique de Nord. En raison de son focus pratique et didactique, il peut aussi être utilisé dans les classes de Master Pro, MBA Pro et MBA pour cadres, afin de faciliter les retours sur expériences en contexte réel.

Résumé du cas

Netflix est une entreprise qui exploite et distribue des films et des séries télévisées. En un temps record, l'entreprise est devenue une licorne, un fleuron de l'économie numérique américaine et un leader mondial du secteur de vidéo en diffusion continue (*streaming*). La pandémie de la COVID-19 ayant favorisé l'éclosion du marché de la vidéo à la demande (VOD) en ligne, les concurrents tels que Amazon Prime Video, Disney+, Apple TV, etc. ont introduit des services comparables avec des bibliothèques de contenus substantielles et des stratégies agressives au niveau du prix. Bien que l'entreprise se trouve aujourd'hui dans une position de force avec une base d'abonnés croissante et des revenus en augmentation constante, les attentes des consommateurs en matière de VOD sont de plus en plus élevées. Ceux-ci recherchent non seulement la diversité et la qualité, mais également des expériences de visionnages personnalisées et interactives. Le modèle d'affaires de Netflix, axé sur un abonnement mensuel sans engagement long terme, offre une flexibilité considérable aux utilisateurs. Toutefois, celui-ci accroît la recrudescence du taux de désabonnement, surtout dans un marché où les alternatives sont nombreuses et facilement accessibles.

Les auteurs ont développé ce cas pour une discussion en classe plutôt que pour illustrer une gestion efficace ou inefficace de la situation. Le cas et les notes pédagogiques ont été examinés de manière anonyme par des pairs en vue d'une présentation à la conférence NACRA 2024, Orlando, Floride, États-Unis, du 17 au 19 octobre 2024. © 2024 par Ernest Kuekam et Stéphane Gagnon. Personne à contacter : Ernest Kuekam, École de gestion Telfer, Université d'Ottawa, 55 avenue Laurier Est, Ottawa (Ontario), K1N 6N5, +1 613 562-5800, Kuekam@telfer.uottawa.ca.

LA COOPÉRATIVE APICOLE IDBOUSTA: RECONQUÉRIR LE MARCHÉ MAROCAIN PAR L'AUTHENTICITÉ ET LA CONFIANCE?

Fatima Ezzahra Ouboutaib, University Ibn Zohr, FSJES, AIT MELLOUL
Abdellatif AIT HEDA, University Ibn Zohr, ENCG
Soumiya Mekkaoui, University Ibn Zohr, ENCG

Case Objectives and Use

Ce cas a pour objectif fondamental de faire connaître deux concepts clés de la valorisation des produits de terroir : *authenticité* et *confiance*. Il permet aux étudiants d'appréhender leurs influences sur le positionnement et l'identité d'une coopérative de terroir. Il a pour second objectif d'appréhender la thématique de la transition digitale, dans un contexte de communication hybride et d'environnement concurrentiel très évolutif. En se concentrant sur la coopérative IDBOUSSETA, qui évoque un gage d'authenticité et un savoir-faire ancestral, il présente également l'intérêt de sensibiliser les étudiants sur les valeurs de la consommation des produits de terroir. Ses objectifs pédagogiques sont d'amener les étudiants à :

- Recueillir et organiser plusieurs informations sur la coopérative, son activité et son mode de production, qui sont éparpillées à plusieurs endroits du cas ;
- Découvrir un mode spécifique de positionnement d'une coopérative et savoir l'analyser avec ses contraintes et opportunités ;
- Être capable de constater la problématique spécifique à la commercialisation des produits de terroir et le rôle des parties prenantes dans sa constitution et sa résolution ;
- Développer la capacité de travailler en équipe en discutant autour d'un acteur assez présent dans la vie quotidienne des étudiants ;
- Développer le sens de créativité dans la résolution des problèmes managériaux. Une connaissance des fondements de l'analyse stratégique est souhaitable pour pouvoir aborder la problématique concernant le positionnement et l'identité de la coopérative.

Case Synopsis

Le cas présenté est inspiré d'une situation réelle de la coopérative Idbousseta. Il nous projette dans le contexte du développement social et solidaire de telle structure. Le cas raconte l'histoire d'évolution de la coopérative familiale Idbousseta depuis sa création par M. Taher. Idbousseta est un agriculteur analphabète, qui s'est spécialisé, depuis 1980, dans la production et la commercialisation du miel. Le choix de ce métier est motivé par la prédominance des reliefs de la province de Sidi Ifni, qui abritent des espèces végétales endémiques. En 2011, Taher a créé la « la coopérative agricole Aidbosta (prononcée Idbousta) », qui s'est spécialisée dans la production et la commercialisation du miel.

La gestion de la coopérative est entièrement familiale. En mars 2023, Mr Taher a acquis une unité de production construite et équipée par l'Initiative de Développement Humain (INDH). Cette unité de production moderne et adaptée aux normes de l'Office National de la Sécurité Sanitaire des Alimentaire (ONSSA) lui permettra d'accéder à d'autres marchés et d'augmenter nettement la quantité produite du miel, qui passera de 2 tonnes à 6 tonnes par an. Après 13 ans comme président de la coopérative, M. Taher est confiant de sa collaboration avec L'Equipe de Recherche en Marketing, Management et Communication Territoriale (ERMMACOT) de l'École Nationale de Commerce et de Gestion d'Agadir (ENCG).

L'objectif de la stratégie commerciale de la coopérative s'articule autour des fondements suivants : la vente directe aux clients, l'authenticité fondée sur un savoir-faire ancestral et des techniques d'élevage apicoles modernes et la mise en place d'une stratégie de confiance. Il s'agit, en fait, de positionner la coopérative comme un acteur légitime et fiable vis-à-vis du consommateur marocain. Comment théâtraliser donc la confiance ? Et comment la coopérative Idbousseta peut-elle se positionner comme authentique tout en inspirant confiance à sa cible ?

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 F. Ouboutaib, S.Rechidi, and S Mekkaoui,. Contact person: S. Mekkaoui, Ibn Zohr university, ENCG, Hay Salam, BP:37/S 80 000 Agadir phone number, 00212661909117, soumiyamekkaoui@hotmail.com.

AJBANE LAMTA (LES FROMAGES DE LAMTA): QUELLE STRATEGIE DE COMMUNICATION POUR COMMERCIALISER UNE NOUVELLE MARQUE DE FROMAGE A BASE DU LAIT DE CHAMELLE

Abdellatif Ait Heda, Ibn Zohr University, ENCG

Case Objectives and Use

Ce cas a été rédigé pour des enseignements en Marketing, Communication, Stratégie. Cette étude cas met les apprenants dans une situation réelle et professionnelle, celles des organisations de l'Economie Sociale et Solidaire (ESS) au Maroc. Elles sont confrontées à la complexité de la gestion d'une marque par la stratégie de communication. A l'issue de l'étude de cas, les étudiants doivent développer des compétences en matière de diagnostic d'identité et de positionnement d'une marque et de conception d'une stratégie de communication pour une organisation de l'ESS. L'apprentissage des étudiants portera sur la persuasion des cibles par la conception de canaux de communication, notamment la communication 360

Il peut être exploité au profit des étudiants du 1^{er} cycle (bac+3) dans le cadre des cours suivants :

- Introduction à la communication ou au marketing pour un cycle de licence professionnelle, pour des étudiants qui vont être initiés à ces disciplines ;
- Introduction au comportement du consommateur en analysant les notions de motivations, de freins, d'attitudes, valeurs, style de vie;
- Le cas peut être aussi enseigné à des étudiants en Sciences de Gestion de niveau Master (M1), option marketing, ou encore des étudiants en master Marketing et Tourisme ;
- Stagiaires de Formation Continue en management souhaitant approfondir leurs connaissances dans le champ de la communication marketing appliquée à la PME à caractère social, notamment pour des :
 - Responsables commerciaux des Groupements d'Intérêts Economiques (GIE) ;
 - Responsables commerciaux des coopératives toute catégorie confondue (coopératives d'artisanat, de terroir etc.) ;
 - Responsables institutionnels impliqués dans les stratégies du développement durable (OG, ONG, Associations, Coopératives).

Case Synopsis

En 2019, Afaf, présidente de la coopérative Ajbane Lamta, et son compagnon Ali ont réussi une innovation presque unique au monde : produire un fromage artisanal doux et crémeux à base du lait de chamelle, qui cible les consommateurs marocains. Depuis 2020, la coopérative Ajbane Lamta commercialise une gamme de produits à base du lait de chamelle avec le fromage artisanal comme produit phare auprès des épicerie fines dans les grandes villes du Maroc. Toutes fois, depuis 2020, la quantité commercialisée n'a pas progressé. Pour Afaf et Ali, il existe trois freins à la commercialisation des produits de la marque Ajbane Lamta : l'image répulsive de la chamelle, l'image du lait de chamelle, qui reste dominé par l'usage contre le cancer et la nouveauté du fromage artisanal comme culture alimentaire au Maroc. Afaf envisage de positionner la marque Ajbane Lamta comme marque qui procure le goût, le plaisir, l'authenticité et la santé. En 2022 et dans le but de rentabiliser la coopérative, les deux associés décident d'augmenter la capacité de production de leur coopérative qui va passer de 50 kg de fromage par semaine à 270 kg. Pour réaliser cet objectif, ils ont réussi à solutionner les contraintes de logistique et de collecte du lait, mais ils doivent mettre en place une stratégie de communication qui puisse surmonter les freins susmentionnés et augmenter les ventes de la coopérative pour assurer le retour sur investissement.

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 Abdellatif Ait Heda. Contact person: Abdellatif Ait Heda, Ibn Zor University ENCG, Hay Salam, BP 37/S, 00212661305461, aaitheda@gmail.com.

FROMAGERIE DONGÉ : QUELS RELAIS DE CROISSANCE POUR PREPARER UNE RELÈVE FAMILIALE RESPONSABLE ?

Sabrina Hombourger-Barès, Université TÉLUQ (Canada)
Christine Kratz, ICN Business School (France)

Case Objectives and Use

Ce cas est réel et de type décisionnel. Il est conçu en étroite collaboration avec la direction de l'entreprise, et a l'avantage de mettre les étudiants en situation, dans un contexte professionnel, avec des données et une problématique réelles.

La présente étude de cas est appropriée dans un cours de Marketing responsable, Marketing entrepreneurial, ou encore de gestion de la marque et des produits. Elle demande un *pré-requis* : *cours d'introduction au marketing ou équivalent*. Elle s'adresse à un public d'étudiants en sciences de gestion, de préférence inscrits en spécialisation marketing, ou de professionnels inscrits à un programme de formation continue en marketing.

À l'issue de ce cas, les étudiants seront en mesure de :

- construire le diagnostic marketing d'une entreprise ;
- reconstituer une plateforme de marque ;
- formuler des recommandations stratégiques et opérationnelles cohérentes en termes de stratégies de croissance responsables et de développement de nouveaux produits ;
- élaborer une proposition de valeur responsable selon les principes de la pensée design (« *Design Thinking* ») ;
- évaluer des présentations express (ou « *pitchs* ») de nouveaux produits responsables.

Case Synopsis

Luc DONGÉ, Président de la fromagerie du même nom, s'interroge sur l'avenir de son entreprise et plus précisément sur la préparation de la relève de cette PME familiale qui perpétue avec passion le savoir-faire traditionnel de la fabrication du brie de Meaux. Dernier producteur indépendant, préoccupé par les enjeux de durabilité, il souhaite pouvoir léguer à ses enfants, la 4^{ème} génération, une entreprise en pleine santé financière, innovante et responsable. Il a bien quelques idées mais il lui faut un projet solide pour pouvoir convaincre les autres membres de sa famille impliqués dans l'entreprise.

Thèmes abordés

Démarche marketing (diagnostic, décisions stratégiques et opérationnelles), marketing entrepreneurial, marketing responsable, gestion de lancement d'une marque et d'un produit.

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 2024 Conference, Orlando, Florida, USA, October 17-19, 2024. © 2024 by Hombourger-Barès and Kratz. Contact person: Christine Kratz, ICN Business School, 86, rue du Sergent Blandan, 54 000 Nancy, France, +33(0)3 54 50 25 04, christine.kratz@icn-artem.com.

Corporate Governance and Ethics Cases

Track Chair: Vijaya Zinnoury, University of Denver

Co-Chair: Theresa Coates, Limestone College

Session Chair: Vijaya (Vi) Zinnoury

Cases

Shake Up at Shake Shack?

Trouble at Tara

Rethinking Governance at a Non-Profit Hospital Foundation

Sleepwear Safety: Sizing Up the Situation

SETT: Breaking Free from Corruption at Bogotá's Transit Office

Authors

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SHAKE UP AT SHAKE SHACK?

Ram Subramanian, Stetson University

Case Objectives and Use

This case deals with corporate governance in a publicly owned company and the role of a corporate board. Corporate governance is a subject area typically covered in a strategic management class at both the undergraduate and MBA levels. The case is suitable for such a course. The case is best placed at the end of the course after the students are introduced to the topic of corporate governance.

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

1. Understand the role of a corporate board in a publicly owned company
2. Analyze the advisory role of a corporate board
3. Evaluate the role of a board as a key corporate governance mechanism

Case Synopsis

In May 2023, Shake Shack Inc., the New York city-based fast casual restaurant chain faced an activist's campaign by Engaged Capital. Citing poor performance compared to industry peers over the 2020-2022 period, Engaged Capital sought three board seats with nominees having industry-specific expertise to advise management on turning around the multi-unit chain. Shake Shack had a dual-share capital structure where Daniel Meyer, the founder controlled 85.9% of the voting rights. As the chairman of the board, Meyer and the board had to respond to the activist's push for board seats prior to the company's annual stockholder meeting scheduled for June 29, 2023.

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 2024 Conference, Orlando, Florida, USA, October 17-19, 2024. © 2024 by Ram Subramanian. Contact person: Ram Subramanian, Stetson University, 421 N. Woodland Blvd., Unit 8398, DeLand, FL 32723, rsubram1@stetson.edu, 386-822-7956.

TROUBLE AT TARA

Helene Johnson (student author), University of South Florida
Matthew Mullarkey (faculty supervisor), University of South Florida

Case Objectives and Use

Trouble at Tara offers the instructor of management, communications, finance, community development, and/or board governance at the undergraduate and graduate level a discussion case that follows the President and Board of an actual Homeowners Association (HOA) deal with the upheaval caused by the need for significant capital investments and resulting homeowner/member assessments.

The case addresses issues with communications, strategic investments, competing interests, community board responsibilities, member rights and board member responsibilities. Students will gain insight into non-profit community boards, HOAs, capital investments, homeowners assessments and the very real way that community communication, cooperation and dialogue can help or hurt members in a collective.

Case Synopsis

In Spring 2024, Tara Country Club is embroiled in a contentious debate that has polarized its members. The rift originated from a proposal for costly club enhancements, dividing members into two camps: the Scarletts, who favored the renovations, and the Rhetts, who opposed them due to financial concerns. The conflict intensified during board elections, with the Rhetts securing all open positions and thus gaining control over club decisions.

Jim Fitzgerald, President of the Board, is caught in the crossfire. His neutral stance during his campaign for president is now challenged by the deep mistrust from the Scarletts towards the Rhett-dominated board. Efforts to resolve issues are hampered by aggressive email campaigns from both sides and disruptions during board meetings.

The club's dynamics echo the characters of "Gone with the Wind," with Scarletts clinging to idealistic visions of the club's future and Rhetts adopting a more pragmatic approach. Jim is challenged to find a strategy that can reconcile these opposing views and guide the club forward.

The member-owners of Tara Country Club face several decision options in addressing their divide. Each option carries potential benefits and risks. Compromising on enhancements might not fully satisfy either group but could prevent further financial strain. Board reformation could lead to more balanced decision-making but might also result in administrative upheaval. Enhancing community engagement could improve trust and communication but may also slow down decision processes.

As Tara Country Club stands at this crossroads, its member-owners must weigh these options carefully, considering both the club's immediate needs and its long-term vision. The club's history mirrors that of "Gone with the Wind," with Scarletts embodying idealism and Rhetts pragmatism. As Jim seeks ways to unite the membership and foster consensus over division, he contemplates whether a middle ground exists that aligns with the community's best interests. The situation at Tara Country Club is not just a reflection of a fictional tale but a real-life dilemma requiring creative solutions to bridge a divided community.

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 2024 Conference, Orlando, Florida, USA, October 17-19, 2024. © 2024 by Helene Johnson and Matthew Mullarkey. Contact person: Matthew Mullarkey, University of South Florida, 4202 E Fowler Ave, Tampa, FL, +1.4405543624 mmullarkey@usf.edu.

RETHINKING GOVERNANCE AT A NON-PROFIT HOSPITAL FOUNDATION

Brooke Klassen, Assistant Professor, Edwards School of Business, University of Saskatchewan
Stephanie Yong, Principal, Sôhkisiwin Solutions

Case Objectives and Use

This case asks students to study a charitable non-profit foundation where the board of directors is dealing with a number of potential governance issues. After completing the case study, students will be able to:

1. Describe the governance challenges that could arise in a fundraising-focused organization.
2. Identify the governance challenges faced by a particular non-profit organization.
3. Propose viable solutions to improve governance and overcome the identified challenges.
4. Construct an action plan to implement the proposed governance solutions.

This case is suitable for use in graduate-level courses in corporate governance, governance and leadership or non-profit governance.

Case Synopsis

Sheila Chen is a board member at Golden Oaks Hospital Foundation in Oakville, Ontario, Canada in 2024. An issue was raised at a recent board meeting about the CEO, Nina Rahman, paying staff cash bonuses out of her personal funds. This issue has led to Chen having other concerns in relation to the involvement of Robert Blackwell, a major donor and former board member, in board affairs. As a member of the governance committee and past board chair, Chen has taken responsibility for ensuring that the governance challenges are addressed, and a plan is constructed to implement the solutions for better governance of the Foundation.

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 2024 Conference, Orlando, Florida, USA, October 17-19, 2024. © 2024 by Brooke Klassen and Stephanie Yong. Contact person: Brooke Klassen, University of Saskatchewan, 25 Campus Drive, Saskatoon, Saskatchewan, Canada, S7H 1H2, 306.966.5181, klassen@edwards.usask.ca.

SLEEPWEAR SAFETY: SIZING UP THE SITUATION

Drew DuBois, Product Safety Professional
James E. Fisher, Saint Louis University
Rob Boyle, Saint Louis University

Case Objectives and Use

This case explores ethical implications involved with safety, marketing, and leadership. The case requires students to consider the tension between compliance and profitability and introduces the idea of managing up while holding leaders accountable for their actions. It would be appropriate for upper division undergraduate ethics, marketing, and management classes as well as graduate level ethics, marketing, and management classes.

Case Synopsis

This 2012 case involves an ethical dilemma faced by Dennis Clark, a newly hired quality engineer at a North American children's clothing retailer. Related to children's sleepwear, Consumer Product Safety Commission (CPSC) standards require that such garments meet strict sizing guidelines to avoid loose fabric that might easily catch fire when coming in contact with an ignition source such as a candle. Specifically, each individual size (8, 9, 10, etc.) must conform to particular measurements in the chest, arm, and seat in order to maintain an appropriately snug fit.

While these standards were clear to the quality engineer, the dilemma became apparent when children's group sizes (ranges) were introduced (4-6, 8-10, 12-14, etc.). The CPSC did not stipulate required measurements for size ranges so the question became whether the snugger fit should be mapped to the lower end of a size range or the upper end of a size range. The company wanted to map the standard to the larger size because their research had indicated this would increase sales. The quality engineer knew, however, that this would render garments at the lower end of the range non-compliant. The company insisted that safety standards would be met because the CPSC offered no specific expectations for size ranges, and the quality engineer was left to balance his own job security with his duty to assure the highest degree of safety.

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 2024 Conference, Orlando, Florida, USA, October 17-19, 2024. © 2024 by Robert A. Boyle, James E. Fisher, and Drew DuBois. Contact person: Robert A. Boyle, Saint Louis University, 3674 Lindell Blvd., St. Louis, MO 63108, (314) 977-3860, rob.boyle@slu.edu.

SETT: BREAKING FREE FROM CORRUPTION AT BOGOTÁ'S TRANSIT OFFICE

Liliana López-Jiménez, Universidad Externado de Colombia
Olga Anzola-Morales, Universidad Externado de Colombia

Case Objectives and Use

This case can be used in courses addressing such topics as business ethics, corruption, or integrity management, both at the undergraduate or graduate level.

It is particularly relevant to students who live or aim to work in contexts deeply affected by corruption, such as some Latin American, African, Middle East and Central Asia countries, as it tells the successful story of a private concession company that managed to abate corruption in the provision of a public service. The main learning points of the case can be extended to public-private partnership arrangements of similar characteristics.

Discussion of the case shall help students attain the following learning objectives:

- Identify various types of corruption and the myriad of consequences associated with it, thereby acknowledging that corruption is not a “victimless crime”.
- Assess the effectiveness (replicability and impact) of measures taken to prevent and eliminate corruption.
- Think about corruption in a more systematic, contextualized, and nuanced way.
- React effectively and constructively to corruption threats within an organizational context.

Case Synopsis

SETT was a private consortium that took over transit services in Bogotá, Colombia, in 1998. Back then, transit services were extremely bureaucratic and inefficient, and corruption was rampant. The case tells the story of what top management did, during SETT's ten-year contract, to counter this situation as the first private concessionaire to ever operate transit services in the country.

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 2024 Conference, Orlando, Florida, USA, October 17-19, 2024. © 2024 by Liliana López-Jiménez and Olga Anzola-Morales. Contact person: Liliana López-Jiménez, School of Management, Universidad Externado de Colombia, Calle 12 No. 1-17 Este, Bogotá - Colombia, +57 6013419900 ext. 1203, liliana.lopez@uexternado.edu.co.

Digital Technologies and Operations Cases

Track Chair: Clinton Daniel, University of South Florida

Co-Chair: G. Shankaranarayanan, Babson College

Session Chair: Clinton Daniel

Cases

Khonology: Digitising the Booming Bond Market

Raia Drogasil 2022

Leading Digital Transformation: Evolving Financial Services into Fintech

Indigestion in Bleaksburg

LAAM: A Fashion Company?

Data Management for Digital Transformation – A Higher Education Institute (HEI) Case Study

Statue of Unity – An Engineering Marvel

The Great Insurance Caper 2.0: Unlocked by Lax Security

Will GenAI Help or Hurt Massachusetts Student Consultants Working for Jamaican Clients?

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KHONOLOGY: DIGITISING THE BOOMING BOND MARKET

Dr Pius Oba, Wits Business School
Garth Balabanoff, Wits Business School
Dr Amanda Bowen, Wits Business School

Case Objectives and Use

The case study focuses on Khonology, a digital innovation company operating in the financial sector of South Africa. Spanning over several years, it examines the journey of the protagonist, the company's founder, navigating the complexities of digital transformation in a traditional industry. Khonology endeavours to revolutionize financial markets through innovative technologies and strategic management approaches. The protagonist faces the challenge of reconciling traditional financial practices with the rapidly evolving digital landscape. This dilemma is exacerbated by the need to balance regulatory requirements, customer demands, and technological advancements. The case study delves into key issues such as devising an effective IS/IT strategy, implementing enterprise architectures, and managing the system development life cycle (SDLC) amidst market disruptions and competition.

Designed to teach strategic management and digital innovation in the financial sector, the case study offers insights into operations process characteristics, performance objectives measures, technology road mapping, and aligning business strategies with technological advancements. It serves as a practical application for postgraduate students (Master of Management/MBA/Executive Education) studying entrepreneurship, technology, operations management, digital transformation, and strategic decision-making in the financial services industry.

Case Synopsis

It was August 2020, and a momentous occasion for Khonology – a digital services business that designed, developed and deployed technology-based systems within organisations. Dapo Adeyemo, one of the company's co-founders, was managing the upload of the final code to a first-to-market, digital bond marketplace platform for Standard Bank, one of South Africa's largest retail and business banks. Surrounded by his delivery team, as Adeyemo watched the code upload, he anxiously pondered if they had guided Standard Bank correctly given the speed at which this project had rolled out. They knew how hard they had worked, however, they wanted to be sure that what they had delivered would add significant value. As they sat together, Adeyemo said aloud, "Have we done our level best?"

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 2024 Conference, Orlando, Florida, USA, October 17-19, 2024. © 2024 by Dr Pius Oba and Garth Balabanoff. Contact person: Dr Pius Oba, Wits Business School, University of the Witwatersrand, 2 St David's Place, Parktown, Johannesburg, South Africa, +27 11 717 3976, pius.oba@wits.ac.za.

RAIA DROGASIL 2022

Ricardo Engelbert, ISE Business School
Fabio Costa Barbosa, ISE Business School
Eugenio Mattioli Gonçalves, ISE Business School

Case Objectives and Use

This case study is ideal for executive education programs, EMBA, and MBA students with substantial work experience, facilitating advanced discussions on strategy execution, organizational agility, and change management. It covers digital transformation, agile methodologies, ambidexterity, change management, and customer-centricity. The learning objectives focus on understanding the significance and components of organizational agility, including its impact on responding to market disruptions and enhancing customer focus, cross-functional collaboration, innovation, and market response. Additionally, the case explores digital strategies for competitive positioning and the transformation process from traditional to agile frameworks, emphasizing that agility is a strategic choice requiring careful consideration.

Case Synopsis

In 2022, amidst the rapidly changing global health landscape accelerated by the COVID-19 pandemic, Raia Drogasil (RD), a leader in the Brazilian pharmaceutical retail sector, began a transformative journey under the leadership of CEO Marcílio Pousada. The company aimed to achieve "Integral Health" for its customers by blending its century-old legacy with a forward-looking digital innovation strategy. This strategic pivot, initiated in 2018, focused on leveraging data analytics for customer segmentation, enhancing customer journey experiences, creating a healthcare marketplace, and fostering an agile organizational culture. RD sought to extend its reach beyond traditional retail by offering a holistic health experience through a synergy of physical and digital channels.

RD's legacy and leadership position, underscored by strategic acquisitions and expansion, provided a strong foundation for its ambitious digital strategy but also introduced some rigidity in its structure and processes. The company's move to embrace digital channels and innovate within these spaces through the N2D Digital Business Center and agile squads marked a significant shift towards a customer-centric approach. This strategic direction aimed at transforming RD from a pharmaceutical retailer to a comprehensive health services provider.

As RD continues to adapt, the company faces the critical task of scaling its digital transformation efforts while maintaining growth momentum. The challenge lies in fostering a culture of agility and innovation, integrating digital strategies with traditional operations, and redefining the pharmaceutical retail experience in the digital age. RD's journey highlights the strategic imperatives, challenges, and opportunities of navigating the digital frontier with a steadfast commitment to health and well-being.

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 2024 Conference, Orlando, Florida, USA, October 17-19, 2024. © 2024 by Ricardo Engelbert, Fabio C Barbosa and Eugenio M Gonçalves. Contact person: Ricardo Engelbert, ISE Business School, Rua Martiniano de Carvalho, 573 – São Paulo, SP, Brazil, +5511963902010, ricardo.engelbert@ise.org.br.

LEADING DIGITAL TRANSFORMATION: EVOLVING FINANCIAL SERVICES INTO FINTECH

Nicole, Stuart (student author), University of South Florida

Case Objectives and Use

This discussion case is designed for use in undergraduate and graduate classes in management, leadership, financial technology (fintech), or management information systems. It aims to help students understand the leadership and organizational challenges faced by traditionally non-technical companies in today's digital markets. The objectives are:

- Understand how the ongoing evolution of financial technology (fintech) extends beyond technology to redefine the market landscape and client expectation, impacting company culture, product offerings, internal processes, and the workforce.
- Differentiate between a standard technology project and a digital transformation through the lens of the DT elements outlined in the case.
- Create a toolbox for effectively structuring and executing a DT, recognizing the need to consider organizational attributes, DT maturity, change management, and market demands to continuously adapt and evolve.

Case Synopsis

This masked case, based on real events, illustrates a challenging yet common scenario faced by traditionally non-technical firms within the financial services sector. Established in the 1970s, Fintex began its digital transformation (DT) journey in 2015, aiming to transition from a conventional financial services company onto a financial technology (fintech) provider. Initially, leadership adopted a decentralized strategy, integrating business and technology across the organization with varying degrees of success. Under market pressure in 2020, Fintex shifted to a centralized approach, creating a Transformation Office to expedite outcomes. This change led to significant progress in flagship products but left the broader organization struggling to keep pace with the digital marketplace. Three years later, recognizing that technology-driven acquisitions have become the norm in financial services, Fintex is now embarking on the next phase of its DT, focusing on expanding digital offerings through mergers and acquisitions (M&A). Drawing on lessons learned throughout their DT journey, leadership must develop a go forward strategy which balances market expectations, internal modernization initiatives, M&A integration activities, and the employee experience to transform Fintex and deliver something remarkable.

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 2024 Conference, Orlando, Florida, USA, October 17-19, 2024. © 2024 by Nicole Stuart. Contact person: Nicole Stuart, University of South Florida, 412-952-1195, nstuartny@gmail.com.

INDIGESTION IN BLEAKSBURG

David W. Chinn (student author), Virginia Tech
Janis L. Gogan (faculty supervisor), Virginia Tech

Case Objectives and Use

This Instructor Manual provides guidance for discussing this case with undergraduate students in an interdisciplinary Introduction to Business course. The case provides opportunities to discuss ideas from managerial, operational, marketing, finance, human resources, hospitality, and other perspectives. Student skills will be developed around four primary learning objectives: (1) Describe the complex, multifaceted, strategically important, and challenging situation in a specific organization (2) For such a situation, identify helpful organizational Strengths that leaders can leverage, as well as organizational Weaknesses that must be fixed or neutralized (3) Identify and explain the implications of positive external political, economic, social or technological trends that leaders can leverage to achieve organizational goals, as well as negative external trends or risks that threaten to impede the organization's leaders from implementing helpful solutions and (4) Informed by SWOT analysis of a specific business, recommend a comprehensive, multi-faceted and actionable solution to the challenging situation.

Case Synopsis

In January 2024 the Virginia Tech Director of Dining Services confronted a projected revenue shortage of nearly \$400,000. For a decade, Virginia Tech operated an award-winning university dining program. During the coronavirus pandemic, dining services on the main campus in Blacksburg (nicknamed "Bleaksburg" given winter conditions there) was shut down briefly, but soon pivoted to mobile orders (students were permitted to return to dorms, although classes continued to be delivered online). Once the pandemic wound down and social distancing was relaxed, students continued to order remotely from their mobile devices, often while in their class or still in their room from their residence hall, expecting their food would be ready when they arrived. This practice soon created overwhelmingly large peak volume orders. Meanwhile, dining services all over the U.S. confronted staffing shortages because many staff who were sent home during the pandemic did not return.

Aware that mobile orders were for higher amounts than those placed in person, the Director was reluctant to pause mobile ordering during peak volume times, and he had not yet identified a good solution to the staffing shortage. Knowing that in April he would attend a meeting of the Virginia Tech Board to update them on how he would balance the dining services budget and continue to deliver award-winning food services, he considered several ideas to improve the situation.

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 2024 Conference, Orlando, Florida, USA, October 17-19, 2024. © 2024 by David W. Chinn (PhD Student) under the supervision of Professor Janis L. Gogan. Contact person: [David W. Chinn, Virginia Tech, New Hall West 104A, 190 West Campus Drive, Blacksburg, Virginia, 540-231-6853, dwc@vt.edu.

LAAM: A FASHION COMPANY?

Hafsa Mahmood (student author), Lahore University of Management Sciences
Hassan Chaudhry (faculty supervisor), Lahore University of Management Sciences

Case Objectives and Use

The case can be used for graduate courses on retailing strategy or technology strategy for a fashion aggregator. It could also be taught from the lens of strategizing ecommerce operations and the role of technology in MBA or executive programs. The case describes the rise of an ecommerce fashion aggregator in an Asian economy with country's diaspora in the western world as a major customer segment. The objective is to identify the case organization's competitive advantage and requires the students to suggest the way forward. Through this case the students will be able to understand the dynamics of fashion marketplace and the role of technology in value creation.

Case Synopsis

The case describes the journey of an online retailer/aggregator LAAM operating in the fashion segment of apparel business. LAAM was set up by two brother Arif and Amir, bringing their tech and fashion world's experience. LAAM was found in January 2020 in Lahore, Pakistan, as an internet marketplace platform, a one-stop online fashion marketplace. As a two-sided marketplace, LAAM brought independent fashion labels (Vendor-partners) and Eastern fashion consumers around the globe together on one platform. LAAM, by January 2023, had around 90,000+ original products listed on the e-store and had 1500+ vendor-partners on board, each with their distinct webpage on LAAM's website: laam.pk. Each vendor's products were hence offered under its brand name. As part of its monetization plan, the platform charged an agreed percentage as commission on the sale price of each sold product. In a move towards modernization, LAAM launched an application for the vendors which allowed the vendors to log in using their authorized credentials providing a one-stop-shop for vendor partners, providing them with access to a multitude of features and data that had been previously impossible to obtain. By 2023, LAAM achieved its highest NPS score, which indicated an increase in customer satisfaction with their products and delivery, leading to more referrals and recommendations to friends and family. The case ends with the LAAM team discussing the way forward to further solidify their position in the fashion retail industry.

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DATA MANAGEMENT FOR DIGITAL TRANSFORMATION - A HIGHER EDUCATION INSTITUTE (HEI) CASE STUDY

Aditi Divatia, SPJIMR
Jyoti Jagasia, SPJIMR

Case Objectives and Use

This case may be used for undergrad, MBA and Exec MBA students of Technology and Management courses. It could also be used in the first year MBA, IT core course to introduce the Enterprise Architecture (EA) approach for digital transformation or in a course that has focus on data management and governance. This case study covers the understanding of an organization's current business processes, data sharing and accessibility through multiple applications and the technology infrastructure. At the end of this case, a student will learn how to use the EA approach, and in particular about the data architecture and governance capability to make the organization flexible, agile and adaptable to change. Students will also learn how to build a "to-be" enterprise architecture plan to align future strategic plans of an organization with their business processes, data, applications and technology.

Case Synopsis

M-HEI, was a top ranking, management school, a higher education institute (HEI) in the western region of India. Typical of a HEI, M-HEI had well-established processes for the entire student journey. M-HEI was an agile institute adapting quickly to changing trends in technology and had been able to withstand the pandemic by quickly shifting to online medium of education. M-HEI was a pioneer in adopting technology for the admissions process, and most of the processes in the academic journey of the student. Despite this, there was no single repository of data, where every department could access student data as most of the applications were siloed. Each department had their own copies of data leading to data inconsistency and redundancy. While there was an ERP in place, there were also multiple applications in different departments, which, were not integrated with the ERP. M-HEI also wanted to scale up existing student capacity as well as reach out to other underserved market segments. As part of the future strategy, there was focus on growing the online programs segment. This would need a lot of work on the technology and data front. Ganesh, the new IT Head, had the responsibility to direct and oversee the transformation to support and strengthen M-HEI's information technology and help in enhancing it to be a world class and state of the art. Where could he start? What approach could he take? What can he do to solve the data issues?

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 2024 Conference, Orlando, Florida, USA, October 17-19, 2024. © 2024 by Aditi Divatia and Jyoti Jagasia. Contact person: Aditi Divatia, SPJIMR, Bhavans Campus, Andheri West, Mumbai, India, +91 9869054138, divatia@spjimr.org.

STATUE OF UNITY – AN ENGINEERING MARVEL

Jyoti Jagasia, SPJIMR
Preeta George, SPJIMR

Case Objectives and Use

The case is suitable for undergraduate, graduate or executive level courses on project management or strategy. This case allows students to appreciate the complexity of stakeholder management in managing public projects which are subject to intense scrutiny by a variety of stakeholders. The case can be taught in a 70-90 minutes session and can be used to understand concepts around stakeholder identification, analysing stakeholder needs and managing the stakeholders.

Case Synopsis

The Statue of Unity is the tallest statue in the world. Standing tall at a height of 182 meters, it is national marvel and a beacon of India's aspirations for unity, development, and global recognition. Its success story offers valuable lessons in leveraging cultural heritage for economic and social advancements, making it a landmark project in India's journey towards sustainable development and inclusive growth.

The construction of the statue was a complex project that involved innovative engineering solutions to address challenges such as wind velocity, seismic considerations, and its unique location. The statue features a viewing gallery at 153 meters, providing panoramic views of the surrounding area, including the Sardar Sarovar Dam.

The case discusses several decision-making dilemmas faced by the Project Director, Mr. Mukesh Rawal – Larsen & Toubro Ltd., during the development of the statue. The project was delivered successfully nevertheless. The story serves as a case study in project management and development, highlighting the successful collaboration between government bodies, private entities, and the local community. It has set a precedent for future projects in India, emphasizing the importance of visionary leadership, meticulous planning, and community involvement in achieving monumental goals.

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 2024 Conference, Orlando, Florida, USA, October 17-19, 2024. © 2024 by Jyoti Jagasia and Preeta George. Contact person: Jyoti Jagasia, SPJIMR, Bhavans Campus, Munshi Nagar, Dadabhai Road, Andheri West, Mumbai - 400058, 9820954801, Jyoti.jagasia@spjimr.org.

THE GREAT INSURANCE CAPER 2.0: UNLOCKED BY LAX SECURITY

Raji Raman (student author), Virginia Tech
Janis L. Gogan (faculty supervisor), Virginia Tech

Case Objectives and Use

This case study is designed for an undergraduate or graduate (MS, MBA) cybersecurity course catering to students with diverse backgrounds. It is best suited to be used later in the semester after students have been introduced to various concepts tied to cybersecurity. It triggers discussion on both technical and managerial cybersecurity challenges within an enterprise network. It alludes to the importance of using industry standard cybersecurity frameworks. The case provides pointers for students with a stronger technical background to dig deeper into the technical aspects, while also guiding students with a primarily business background to grasp the managerial considerations of cybersecurity within an organization.

Case Synopsis

The Citadel Shield Insurance¹ data breach case, primarily told through the eyes of IT director, Tomé Silva, offers a detailed look into the challenges of responding to a cyberattack and the importance of proactive cybersecurity measures. Silva's initial shock upon learning of the potential leak of sensitive customer information quickly turns into a race against time as he assembles a team and grapples with the limitations of the company's IT infrastructure, particularly the inadequate log retention policy and the absence of a dedicated cybersecurity lead. With the help of Ronnie Santos from the cybersecurity firm, Integral Solutions², Silva navigates the challenges, including the pressure of GDPR's 72-hour notification deadline. Through careful analysis of application logs, firewall logs, and web server logs, they eventually identify suspicious activity associated with a user account (JohnDoe) belonging to a former employee, revealing unauthorized remote data extraction. While the investigation provides some answers, it also leaves several crucial questions unanswered. The individual behind the JohnDoe account remains unidentified, raising concerns about potential insider threats and the effectiveness of employee offboarding processes. The full extent of the data breach and the specific information compromised are still unclear, which is likely to leave customers anxious about the potential consequences. Additionally, the long-term impact on Citadel Shield's reputation, financial stability, and potential legal and regulatory repercussions under GDPR remain uncertain. Silva's experience serves as a cautionary tale, emphasizing the critical need for organizations to prioritize proactive cybersecurity measures, including robust log retention policies, dedicated cybersecurity expertise, and a thorough understanding of network infrastructure. As Citadel Shield moves forward to identify the perpetrator, strengthen security, and fulfil GDPR requirements, the case underscores the ongoing challenges organizations face in the aftermath of a cyberattack and the importance of continuous vigilance and improvement of cybersecurity practices to protect sensitive data and maintain customer trust in an increasingly digital world

¹ **Note:** To protect confidentiality, date of breach, the company name, and personnel names of the attacked insurance company have been disguised at the request of the sponsor

² **Note:** Pending legal department approval and the sponsor's name and company are disguised in this submission

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 2024 Conference, Orlando, Florida, USA, October 17-19, 2024. © 2024 by Raji Raman. Contact person: Raji Raman, Virginia Tech, Pamplin College of Business, Virginia Tech, 7054 Haycock Road Falls Church, VA 22043, rajiraman@vt.edu.

WILL GENAI HELP OR HURT MASSACHUSETTS STUDENT CONSULTANTS WORKING FOR JAMAICAN CLIENTS?

Edward Walters (student author), Virginia Tech
Zohaib Qazi (student author), Virginia Tech

Case Objectives and Use

This case could be taught in several different courses, including marketing, business ethics, and international business. This instructor's manual is designed to support student analysis and discussion of the case in an advanced undergraduate or graduate course on Emerging Technologies in Business. The case provides opportunities to discuss ideas from ethical considerations of Gen AI, impact of GenAI on business practices, marketing, evaluation of GenAI, emerging technologies, and other perspectives. Student skills will be developed around three primary learning objectives: (1) Apply Stakeholder Theory to identify stakeholders who can be affected by use of an emerging IT application (such as a GenAI tool like Chat GPT-4), and to assess different stakeholders' likely claims and degree of influence. (2) Gain skill in assessing potential risks and challenges associated with an emerging technology (such as Gen AI), and in mitigating these risks. (3) Demonstrate an ability to analyze ethical considerations and implications of using Generative AI in a business context.

Case Synopsis

"Jamaican Journeys" is a study-abroad business course designed to provide students with immersive, experiential learning by working on real-world consulting projects for small businesses in Jamaica. The case centers around the case protagonist, Howard Goode, an adjunct professor at Bentley University. Goode envisioned creating "Jamaican Journeys," a study abroad tour class that would immerse students in Jamaican culture and business practices, enhancing their global business acumen and cultural sensitivity. Isaura Beltre, a full-time Marketing Lecturer, also plays a crucial role in the case by providing additional expertise in marketing and cultural studies and helping Goode navigate the bureaucratic processes for course approval. Together, Howard and Isaura faced challenges as to whether they should integrate Generative AI (GenAI) tools like ChatGPT-4 into their business course curriculum and if so, how they should develop GenAI into the course to enhance student learning and project outcomes. During the Spring of 2023, Goode and Beltre successfully developed the course and gained approval to teach the course during the spring of 2024. A key element of the course was the students' marketing consulting project, in which student teams would help real Jamaican companies develop a strategic marketing campaign. During the end of the summer of 2023, Goode and Beltre needed to decide how best to structure their requirement for students to use ChatGPT-4 to assist them in their consulting projects, to protect stakeholders – students, their business clients, the instructors, and ultimately Bentley's reputation as an institution dedicated to ethical education and business practices.

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 2024 Conference, Orlando, Florida, USA, October 17-19, 2024. © 2024 by Edward Walters and Zo Qazi (PhD Students). Contact person: Edward Walters edwalters@vt.edu and Zohaib Qazi zoqazi@vt.edu, Virginia Tech, 755 University City Blvd 226, Blacksburg, Virginia, 203-571-8518, 661-301-5272.

Entrepreneurship, Family, and Small Business Cases

Track Chair: Sonia Mehrotra, S.P. Mandali's Prin. L.N. Welingkar Institute
of Management Development and Research

Co-Chairs: Sarah Holtzen, Missouri Southern State University

Session Chair: Sonia Mehrotra

Cases

Authors

Veiled Disclosure: Should the Hatter Angel Network Stay in the Deal?

William Andrews

Bubble Well's Dilemma: One Immigrant Entrepreneur's Journey of Resilience and Expansion

Daisy Wang
Jasmin Lin
Chialing Hsieh

Integral Hockey: An Entrepreneur's Journey

William R. Holmes

A New Target for Dart Drones? When Good Business Ideas Get Grounded.

Jessica M. George
Michelle Pannone

Managing Growth at Highland Brewing Company

Justin Kent
Tiberiu Ungureanu
Mark Lewis

The Three Sisters and their Regrowth

Gina Grandy
Emily McNair
W. Glenn Rowe

Time Fayus Inc: Expansion Opportunities in Nigeria

Mc Edward Murimbika

VEILED DISCLOSURE: SHOULD THE HATTER ANGEL NETWORK STAY IN THE DEAL?

William A. Andrews, Stetson University

Case Objectives and Use

The case was designed for use in a graduate or upper-level undergraduate course in venture capital or private equity investing. The case highlights the importance of trust and its relationship to disclosure in the investing process. It can also be used in a general entrepreneurship course in a module that addresses the fund-raising process from the entrepreneur's perspective. Finally, it could be used in a course on business ethics, as it addresses the thorny issue of how much disclosure is required or expected in ethical transactions.

Case Synopsis

The Hatter Angels, members of the Hatter Angel Network, (HAN) must decide jointly and severally whether to rescind an agreement to invest in Spectrex, an immensely promising early-stage technology start-up. In May of 2024, after performing two months of due diligence and deciding to invest about \$205,000, a \$750,000 IRS liability not previously noticed by the investors was discovered in the text of the subscription agreement. Some of the angels believed Spectrex should have been more forthcoming about this liability and felt that the company had not acted in good faith. The company pointed out that this liability was disclosed in the middle of a large comprehensive document sent to the analysts at the start of the due diligence process. Moreover, because a payment arrangement had been offered to the IRS, Spectrex did not believe it warranted special notice in the due diligence process. Three of the 11 investing angels had already signed their individual subscription agreement without recognizing the large liability. The angels had different views about whether Spectrex's behavior was duplicitous and whether the magnitude of the liability materially impacted the HAN's investment thesis. Spectrex was now uncertain whether it wanted the HAN as an investor, since they seemed to be distrustful and high-maintenance. Both sides had been eager to close the deal. Now the individual angels must decide whether to try to extricate themselves from the deal altogether, renegotiate the terms, or stay in on the current terms. Several of the angels provided their perspectives.

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BUBBLE WELL'S DILEMMA: ONE IMMIGRANT ENTREPRENEUR'S JOURNEY OF RESILIENCE AND EXPANSION

Daisy Wang, East Stroudsburg University
Jasmin Lin, Robert Morris University
Chialing Hsieh, The University of Texas at Tyler

Case Objectives and Use

This case is ideal for courses in strategic management, entrepreneurship, small business management, and marketing, targeting undergraduate, MBA, and executive MBA students. It covers key issues like site selection, financial planning, market analysis, competitive dynamics (Porter's Five Forces), and investment decisions (real option theory). Additionally, it explores effectuation theory in entrepreneurship and the potential of franchising for growth. Students will develop skills in strategic analysis, financial assessment, decision-making, and gain insights into expanding a small business in a competitive market.

Case Synopsis

Sylvia and Lu, founders of Bubble Well, a successful bubble tea shop in Denton, TX, are considering opening a second store in the Dallas/Fort Worth area. Their journey began in 2017 when they relocated from Tennessee to Texas due to Lu's new job. Sylvia initially worked at FengCha Teahouse but faced poor working conditions and harassment, prompting her to quit and later work at 85-Degree Bakery Café. The couple decided to start their own bubble tea shop, leveraging Sylvia's experience.

In May 2018, they opened Bubble Well in Denton, investing \$20,000 and securing a favorable rent of \$1,400 per month. Despite initial struggles due to road construction and financial difficulties, the shop eventually thrived, especially during the COVID-19 pandemic when takeout and delivery orders increased. By mid-2021, Bubble Well was profitable, with monthly sales reaching up to \$50,000 during peak seasons and net profits around \$30,000.

With \$100,000-\$150,000 in reserves, Sylvia and Lu explored potential locations for a second store: Lower Greenville, Lovers Lane, and Little Elm. Each location offered unique advantages and challenges. Lower Greenville had proximity to a Mexican supermarket but required extensive renovations. Lovers Lane, situated in an affluent area near Southern Methodist University, had limited parking. Little Elm, though further from Dallas, offered a \$10,000 renovation subsidy but faced potential lease increases. Despite their success, Sylvia and Lu faced significant challenges with rising leasing and construction costs. They needed to consider whether to proceed with the second store, balancing the potential for growth against financial risks. Their decision would shape the future of Bubble Well, determining whether to expand their successful business or consolidate their current achievements.

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INTEGRAL HOCKEY: AN ENTREPRENEUR'S JOURNEY

William R. Holmes, Royal Roads University

Case Objectives and Use

This case is suitable for graduate (MBA level) and senior undergraduate courses in entrepreneurship or strategy. This case describes the development of a new venture from the ideation stage through incorporation, the patenting of a process, franchising, and rapid growth to the point where it is about to transition into a mature company. Students will gain insight into the entrepreneur's journey and the challenges faced by the founding entrepreneur in leading the company through its initial development, the COVID-19 pandemic, geographic growth, product development, and its evolution from start-up to an established company.

Case Synopsis

Integral Hockey has developed and patented a process to repair broken or damaged carbon fiber composite hockey sticks. Prior to the development of this process, owners of these sticks had no other option but to purchase a new one if their stick broke. The founder, Randy Langille, started Integral Hockey to save players and their families money by providing them the option of repairing their broken carbon fiber composite hockey sticks rather than incurring the costs of replacing the expensive sticks.

Langille developed the process over a decade and had it patented in 2010. He incorporated Integral Hockey in 2011 and the first franchise opened in Cowichan Valley later that year. By the middle of 2024, Integral Hockey had 92 franchisees across Canada and the United States, with another one just starting up in Finland. Integral Hockey was originally conceived with the intention of saving players and their families money, but it soon became apparent that there were environmental benefits in terms of keeping significant amount of carbon composite material out of landfill sites. The company was also committed to supporting and giving back to local hockey communities.

In mid-2024, the company was at a pivotal point in its development. Its reputation for providing a quality product which provided benefits to its customers, the environment, and the broader community had been firmly established in the marketplace and it was rapidly becoming a household name in the hockey community and a disruptive force in the hockey equipment industry. Langille saw several opportunities to scale and grow the company including both geographic expansion and the development of new product lines. He needed to determine how he should position his company to take advantage of these opportunities, and how his role as founder entrepreneur would transition as the company continued to evolve.

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A NEW TARGET FOR DART DRONES? STAYING OR CHANGING THE COURSE AS A TECH CENTERED VENTURE.

Jessica George (student author), Virginia Tech
Michelle Pannone (student author), Virginia Tech
Janis Gogan (faculty supervisor), Virginia Tech

Case Objectives and Use

This case is intended for professors teaching entrepreneurship to upper-level undergraduates and MBA students but may also be used for courses on business strategy and technology innovation. It gives students an opportunity to consider how and why external forces impact business strategy and inform entrepreneurs' process of identifying promising marketing opportunities and considering strategic pivots. In this case, rapid socio-technical change and a tenuous regulatory environment associated with drone technologies creates uncertainty that makes it difficult to estimate scalability benefits.

Student learning objectives include (1) the opportunity to identify external factors affecting the company's strategy through a PESTEL analysis, (2) evaluate available options using the Ansoff Matrix and (3) recommend actionable steps through the application of cutting-edge research on entrepreneurial pivots.

Case Synopsis

Abby Carroll launched DARTdrones in 2014 while an MBA student. Seeing the potential impact of drones in commerce and industry, especially in future delivery services, she recognized a long-term need for trained and certified individuals to operate drones. In business plan competitions, judges agreed and (in some cases) provided startup funding to further develop their idea and build a training network. By Fall 2023, the company had 11 employees and was contracted with more than 50 experienced airline pilots to teach various drone related courses.

When Carroll founded the company, its strategy assumed that drones would have widespread commercial use. However, a myriad of local, state and federal regulations has prevented pervasive drone adoption, causing Carroll to consider whether it is time to pivot to a new approach. Most notably, the Federal Aviation Administration's (FAA) Part 107 requirements dictate that pilots must maintain visual line of site with the drones they operate, making it difficult for many of the company's clients in the delivery and inspection industries to grow their programs. As co-founder and CEO, she considers the pros and cons of pivoting to a new strategy or waiting for the FAA to ease restrictions. Work-life balance also weighs on her decision now that she and her husband have two young children.

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 2024 Conference, Orlando, Florida, USA, October 17-19, 2024. © 2024 by Jessica George and Michelle Pannone under the supervision of Professor Janis L. Gogan. Contact person: Jessica George, Virginia Tech, 190 West Campus Drive, Blacksburg, VA, 717-658-6003, jmgeorge@vt.edu.

MANAGING GROWTH AT HIGHLAND BREWING COMPANY

Justin Kent, Appalachian State University
Tiberiu Ungureanu, Appalachian State University
Mark Lewis, Appalachian State University

Case Objectives and Use

This case was written to be used in an undergraduate strategic management course and was developed with the intent to illustrate strategic implementation. The case may also be used in Entrepreneurship or small business management courses to illustrate challenges associated with growth and family business.

Case Synopsis

In 2024, as the popularity of craft beer plateaued, Leah Wong Ashburn wrestled with how to guide Highland Brewing Company (HBC) into its next phase of growth. Leah took over HBC from her father who founded the craft brewery in 1994. Since then, HBC has enjoyed rapid growth while developing a reputation for innovation, quality, and community. With this new competitive landscape, Leah was at a crossroads on how to lead HBC into its next phase of growth. She had three potential initiatives she could pursue, including enhancing the customer experience to drive profitability, introducing a new packaging format to broaden market reach, and diversifying the product portfolio to appeal to health-conscious consumers by offering non-alcoholic products. Each of these initiatives had associated risks and rewards that needed to be evaluated before Leah made a decision. Compounding these challenges, Leah wanted to honor the legacy her father built while making her own mark on the tradition of HBC.

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THE THREE SISTERS AND THEIR REGROWTH

Gina Grandy
Emily McNair, University of Regina
W. Glenn Rowe, Ivey School of Business, Western University

Case Objectives and Use

This case was written for an introductory course in Entrepreneurship to illustrate how entrepreneurs make decisions to start and grow new ventures. It could be used in an undergraduate or MBA initial entrepreneurship course. Given the scarcity of cases on women entrepreneurs, this case fills that gap and highlights entrepreneurial motivations and measures of success.

It is best placed after students have been introduced to entrepreneurial thinking and decision-making models, as it aims to illustrate how decision making logics of successful entrepreneurs are a combination of both causal and effectual approaches.

Students will learn:

- To understand entrepreneurial motivations and measures of success for women entrepreneurs;
- To identify and assess different decision-making logics, specifically the causal and effectuation models of entrepreneurial action; and,
- To identify and evaluate recommended strategies of growth for entrepreneurial businesses.

Case Synopsis

Aimee Schulhauser, a serial entrepreneur in Regina, Saskatchewan, was contemplating how best to regrow her original trio of culinary businesses to their pre-COVID profitability levels. Her early, successful entrepreneurial business decisions were led by a combination of gut instinct, watching trends, and seizing opportunities, but her more recent start-ups in 2018 and 2020 were more calculated business decisions that ultimately failed. In June of 2023 the original trio of ‘sister businesses,’ as she referred to them, were improving in both sales and profitability, but it hadn’t been easy. Customers’ buying behaviours had changed significantly, and with six months before the federal government *Canada Emergency Business Account (CEBA)* loan was due to be paid, Schulhauser’s focus had shifted from growing through new businesses to how best to regrow the core businesses.

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TIME FAYUS INC: EXPANSION OPPORTUNITIES IN NIGERIA

McEdward, Murimbika, University of the Witwatersrand
Clare, Mitchell, University of the Witwatersrand

Case Objectives and Use

In January 2024, nearly 13 years after Fayus Inc., a US-based distributor of Nigerian food products, began investing in oil palm plantations in Nigeria, its founder, Fatai Yusufu, faces a momentous decision. Yusufu, a Lagos-born Nigerian who migrated to the USA in 1977 to study at San Francisco State University, must decide on the future direction of his global expansion strategy. The goal is to diversify the African ethnic food business by seizing new opportunities in palm oil agro-production, processing, and trading sectors in Nigeria.

This business case study focuses on Fatai Yusufu and the real-life US immigrant-owned company, Fayus Inc., based in California, with global market reach and now aims to expand into West Africa. The case study highlights the impact of cultural adaptation, international business strategies, and strategic decision-making on international diversification and business growth, while balancing competitiveness with community empowerment considerations.

Students are prompted to assume the role of Fatai Yusufu, who must decide whether to capitalize on the opportunity to expand the company's agri-production and processing business in Nigeria while maintaining its established and lucrative operations in the USA. The company's expansion plans in Nigeria include substantial capital injection to purchase land for palm oil plantations and constructing a local oil palm processing mill by 2027.

Case Synopsis

While grappling with this international investment decision, the case also explores Fatai's ethical and diaspora (returnee) entrepreneurship dilemma. It considers sustainable community development while aiming to build a global business distribution network and implement growth-oriented strategies. The case study underscores the potential benefits of the investment, such as supporting small-scale women farmers and leveraging Nigeria's position as a leading palm oil producer on the continent.

Despite initial success in Nigeria, Yusufu faces the dilemma of further investing in the Nigeria project amidst risks related to government support, land tenure issues, and overall project viability. Despite challenges such as inexperience in the Nigerian market, land tenure complexities, and limitations in financial management and international investment strategy, Yusufu remains committed to his long-term vision. His goals include securing Fayus Inc.'s global palm oil supply chain, supporting and empowering local communities, and contributing to sustainable development in Nigeria. Reflecting on the interconnectedness of entrepreneurship and risk, he contemplates whether the potential rewards justify the risks associated with the venture. "I have learnt over the years that entrepreneurship and risk have a symbiotic relationship," he said. "If you don't take the risks, you will not get your reward." He must decide whether to increase the firm's investment in Nigerian palm oil production and agribusiness without compromising its operations in the USA is a risk worth taking.

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 2024 Conference, Orlando, Florida, USA, October 17-19, 2024. © 2024 by McEdward, Murimbika, | Clare, Mitchell, | Contact person: McEdward Murimbika, University of the Witwatersrand, Johannesburg, Graduate School of Business Administration, 2 St Davids Place, Parktown, Johannesburg, South Africa, +27 11 717 3695, E: mcedward.murimbika@wits.ac.za.

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

Cases	Authors
Designing a New Brand Portfolio for ITC Mangaldeep	Ruppal Walia Sharma Janani Kandaswamy
Arte Capital: Integrating Human and Artificial Intelligence to Revolutionize the World of Art	Silvia Cacho-Elizondo Antonio Casanueva
Carolina Hurricanes: A Whale of a Branding Decision	Michael Stanko
PeerDrop - Data-Driven Growth Through Persona-Based Targeting	Umamah Hashemi Saima Hussain
STEM Toys by ENGINO (Cyprus): A Marketing Plan for the New Subscription Box	Mike Berry Olga Kandinskaia
Targeting Success: Power Cement's Approach to Brand Recognition	Saima Hussain Umamah Hashemi

Table 2
Session Chair: Grishma Shah

Cases	Authors
Imbibitive Technologies – The Challenge of a Superior Product	Navjote Khara Eric Dolansky
From Cheers to Controversy: Bud Light’s Brand Marketing Challenges	Kevin McDermott Rob McLean Vickie Quigg
Samsonite's Market Penetration and Strategic Growth in India	Megha Choudhary Dinesh Sharma Arti D. Kalro
Modi Toys: Growing and Navigating a Niche Brand in a Global Marketplace	Grishma Shah Adeniyi D. Olarewaju
Taiga Motors: An Expansion Strategy to Sustain Market Leadership	Amir Taherizadeh Hamid Etemad

Table 3
Session Chair: Michael Goldman

Cases	Authors
Rablo: The Challenge of Commercializing an AI Solution	Antonio P. Casanueva Silvia Cacho-Elizondo Carlos A. Castellanos
Johnson & Johnson: Defending Leadership in a Crisis	Gustavo Calatrava Tomas Bouthemey
Distribution at Stellarlube: Slow and Steady is the Winning Strategy. Or is it?	Renuka Kamath

DESIGNING A NEW BRAND PORTFOLIO FOR ITC MANGALDEEP

Ruppal Walia, Sharma, S. P. Jain Institute of Management and Research
Janani, Kandaswamy, ITC Ltd.

Case Objectives and Use

This case is designed for use at the postgraduate level in Brand Management or Marketing Strategy courses, as well as in executive management programs. In the Brand Management course, this case is best situated in the second half of the course under the module on brand architecture. In the Marketing Strategy course it is best aligned to the module on growth strategy or the module on linking consumer insights to strategy.

This case aims to enable students to:

- Analyze target segments in terms of key benefits sought and develop the brand promise
- Identify portfolio gaps and tap market opportunities for brand growth
- Understand the criteria which can be used to design brand architecture for achieving optimum performance

Case Synopsis

In February 2019, Janani Kandaswamy, Category Brand Lead for Incense and Fragrances at ITC Limited, was working on a growth plan for Mangaldeep, ITC's flagship brand of incense sticks. ITC Limited, was a well-diversified conglomerate and was counted among India's foremost private sector companies, with a gross sales value of over INR 670 billion (~USD 10 billion) (ITC Annual Report, 2017-18). Mangaldeep was launched in 2004 with the objective of making it the flagship brand of ITC's incense stick portfolio. Mangaldeep had risen to the second position in the Indian incense sticks market. Though profitability was good, topline growth was sluggish.

Mangaldeep offered a range of products covering the economy, popular and premium categories. Price per stick was the key parameter which players in the industry focused on. However, this was leading to commoditization of the category. Many consumers looked beyond price at fragrance quality and variety. A Usage and Attitude study of Indian consumers indicated that key drivers of using incense sticks revolved around fulfilment of one's prayers, making the prayer ritual complete and bringing peace and harmony. Five segments were identified based on the consumers' motivation for puja and the manner in which they expressed their devotion. In addition to the U&A study, Janani also looked at the emerging trends which pointed towards a) an upward shift of consumers of unbranded incense sticks and b) higher levels of category engagement. As per the existing strategy, Mangaldeep had a single broad positioning across its portfolio, as the brand of pure worship which helped connect to the divine. But Janani believed that it was time to move away from a one size fits all positioning and create well differentiated offerings and define customized value propositions for each of the segments. She had to design a portfolio strategy which would help double revenue over three years, tap into new growth opportunities and make Mangaldeep the most loved devotional brand in the category.

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ARTE CAPITAL: INTEGRATING HUMAN AND ARTIFICIAL INTELLIGENCE TO REVOLUTIONISE THE WORLD OF ART

Silvia Cacho-Elizondo, IPADE Business School
Antonio Casanueva, IPADE Business School

Case Objectives and Use

This case is suitable for MBA students or Executive Education programs focusing on Marketing Strategy, Digital Marketing and Digital Transformation. Arte Capital explores how entrepreneurs use new technologies to enhance their Marketing model, diversify and expand their art ecosystem.

- **To explore** the incorporation of emerging technologies such as AR, AI, and the Metaverse for developing a diversification strategy in the art market.
- **To analyze** the benefits and risks associated with adopting technologies in business strategy.
- **To understand** the criteria that help prioritize the selection of a technology for business diversification.
- **To reflect** on the factors that need to be considered for a successful strategy involving emerging technologies in the market.

Case Synopsis

This case examines the challenges faced by the founders of the Arte Capital platform, Alfredo Sánchez and Christian Borbolla, in March 2024, as they planned their second International Art Fair. They wondered if investing in technology could help achieve the profitability they did not reach in the first fair, held a year earlier, and continue to drive the growth of the Arte Capital ecosystem. They considered three main investment options: 1) Augmented Reality (AR), 2) Artificial Intelligence (AI), and 3) Virtual Reality (VR) & Metaverse.

For Alfredo and Christian, these options had the potential to make their value proposition more attractive to their different target markets: artists, sponsors, investors, and collectors, as well as the general public. However, they needed to thoroughly evaluate the advantages and disadvantages of these options, considering the costs and risks associated with each. Their decision-making process would not be easy, as several artists expressed their opposition and fear that these technologies might become a real threat to their creative work. On the other hand, some artists saw them as potential accelerators and assistants to expand and differentiate their art in an increasingly competitive and global market.

Alfredo and Christian had to decide where to focus: Could AR, AI, and the Metaverse become drivers of future growth and profitability for Arte Capital, revolutionizing the art market?

Keywords: Art, Marketing, Business Strategies, Technologies, Augmented Reality (AR), Artificial Intelligence (AI), Virtual Reality (VR), Metaverse.

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CAROLINA HURRICANES: A WHALE OF A BRANDING DECISION

Michael A. Stanko. NC State University

Case Objectives and Use

The case is suitable for either undergraduate or graduate marketing, sports marketing or management students. The case is intended for core graduate-level marketing courses or undergraduate or MBA marketing strategy courses and will also fit well in courses on branding, sports marketing or management. After working through the case and assignment questions, students will be able to do the following:

- Deeply consider the state of a brand and whether overhaul is needed, as well as think about secondary brand elements within a set of brand assets.
- Learn to intentionally consider an organization's focus.
- Learn to set goals in a challenging, fast-changing, complex marketing environment.
- Develop the ability to evaluate and alter the customer experience.
- Consider the marketing intelligence challenge faced here within an understanding of the market research process.

Case Synopsis

The National Hockey League's (NHL's) Carolina Hurricanes (i.e., the Canes) were struggling on the ice in 2017-18. The team had not made the playoffs since 2008-09, attendance was at the bottom of the league, and rumors regarding the team relocating were circulating. At the time, the team was not very relevant across the hockey universe, and elements of the Hurricanes brand had been harshly critiqued. Mike Forman (The Hurricanes' Senior Director of Marketing and Brand Strategy) had important decisions to make. A change in ownership that became finalized early in 2018 opened up the possibility of using the long dormant logo and jersey of the Hartford Whalers, who had relocated to become the Hurricanes in 1997. While trends around alternate jerseys and the popularity of all things retro seemed to support embracing the Whalers identity, would any effort placed here be diverted from fixing the underlying issues with the Hurricanes brand? This teaching note guides leadership of a case discussion including themes of branding and secondary brand elements, organizational focus, customer experience and the importance of fun to an organization and its customers. Online assignment questions challenge students to 1) develop a marketing research plan and 2) use artificial intelligence to develop brand elements. Several multimedia resources are suggested to support instructors delivering this case.

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PEERDROP - DATA-DRIVEN GROWTH THROUGH PERSONA-BASED TARGETING

Umamah Hashemi, Karachi School of Business and Leadership
Saima Hussain, Karachi School of Business and Leadership

Case Objectives and Use

The case is positioned as a useful learning tool for a Master's in Business Analytics Program, particularly for courses such as Marketing Analytics, Machine Learning and Data Science. PeerDrop case specifically focuses on Machine Learning based clustering techniques, with a concept of segmentation in marketing. For Marketing Analytics course, this case provides students with a scenario where they can apply their knowledge regarding basic segmentation. Students will have the opportunity to analyse demographic data and to consider the various techniques of segmentation (K-Means, Hierarchical and Geographical clustering) to strike a balance between cost-effectiveness and targeting niche segments. Machine Learning course must be taken as a pre-requisite course to this.

In the Machine Learning course, the case could offer an understanding of how different clustering algorithms can be used to group customers based on multiple descriptors such as age, income, and gender. Students can also explore the advantages and limitations of using machine learning in context to PeerDrop case. They can also discuss the merits and demerits of alternative clustering techniques. In Data Science course, students can have an opportunity to practice their skills in data analysis and interpretation. The PeerDrop data set can be used by students to perform analysis based on different Machine Learning based techniques to segment data effectively.

Case Synopsis

January 2022: Syed Mustafa Kamal, co-founder of London's PeerDrop grocery delivery app, needs to stretch his social media advertising budget. PeerDrop serves two user groups: "peers" who shop and deliver groceries, and "patrons" who place orders. Mustafa seeks targeted customer personas for a new social media campaign to maximize user acquisition efficiently.

This case explores customer segmentation using data from a December 2021 campaign. The challenge is finding the best way to segment users for targeted ads. Key questions include:

1. What criteria define customer personas (e.g., income, age)?
2. How many and how specific should these personas be?
3. Can machine learning help identify optimal segments?

Mustafa also seeks location-based targeting to improve marketing and operations. By analysing data and developing targeted personas, PeerDrop hopes to acquire new users efficiently and accelerate growth.

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STEM TOYS BY ENGINO (CYPRUS): A MARKETING PLAN FOR THE NEW SUBSCRIPTION BOX

Mike Berry, Hult International Business School
Olga Kandinskaia, University of Limassol

Case Objectives and Use

This case is suitable for senior undergraduate and MSc/MBA (executive/non-executive) courses in Marketing or Digital Marketing. The case addresses the marketing challenges of launching a Direct-To-Consumer (DTC) e-commerce operation. Students will develop an understanding of the difficulties of driving subscriptions with a weak brand without sufficient budget for mass awareness channels (e.g. TV). Students will learn about the broad trend of digitalisation and the impact of the pandemic on retailing. This case teaches the value of testing and learning, and of building a community of engaged brand advocates that will grow through a combination of high-quality product, word-of-mouth advocacy, and cost-effective (primarily digital) marketing communications.

This marketing case may be used on its own, or alternatively, it may serve as Part B if used in conjunction with the STEM Toys by ENGINO finance case. The latter describes ENGINO's situation at the start of the Covid-19 pandemic, in April 2020, when the Founder undertook a financial and strategic analysis for the new STEM subscription box. Using the same company story across different MBA modules, i.e. finance and marketing, helps build inter-disciplinary links.

Case Synopsis

The case is set in early July 2021, in Limassol, Cyprus. Nikos Georgiou was the newly appointed Marketing Manager at ENGINO, a STEM toy company based in Cyprus. He was preparing for a crucial meeting with ENGINO Founder Costas Sisamos. ENGINO manufactured and distributed science-oriented construction toys, resonating nicely with the new post-pandemic global educational focus on STEM subjects (Science, Technology, Engineering, and Maths). ENGINO's products had won many awards and attracted favourable PR.

Having seen on the one hand, the success of the Amazon STEM Science Club, and on the other hand, witnessing a major business disruption due to Covid-19, which had hit hard ENGINO's traditional B2B business model, Sisamos came up with the idea that ENGINO could offer its own subscription plan where ENGINO would deliver each month a STEM-oriented construction set. It was envisioned as a potential way to pivot the whole company to a B2C business model. After a thorough strategic and financial assessment in Spring 2020, Sisamos made a decision to proceed with the Subscription Box idea – only to hit a wall – he lacked a marketing plan for the launch. Georgiou's key task was to develop the marketing strategy for the planned launch of the ENGINO Subscription Box (ESB), which was crucial to the future success of the whole business.

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TARGETING SUCCESS: POWER CEMENT'S APPROACH TO BRAND RECOGNITION

Dr. Saima Hussain, Karachi School of Business and Leadership
Umamah Hashemi, Karachi School of Business and Leadership

Case Objectives and Use

The case examines the challenges faced by Power Cement, a leading cement manufacturer in Pakistan, in the areas of brand awareness, brand equity, and brand visibility in retail market sector. The target audience for this case are students from Undergrad and graduate programs enrolled in electives of Brand Management, Strategic Brand Management, Retail Marketing, Sales and Distribution. The key issues addressed are related to Brand positioning, Customer based brand equity, marketing strategies, and marketing penetration strategies. It will help develop critical thinking, apply marketing principles to real world business challenges, develop strategic thinking, and gain insights into the complexities of brand management.

Case Synopsis

This case study focuses on Power Cement Limited (PCL), a leading cement manufacturer in Pakistan's Southern region. Despite strong performance in the industrial and commercial segments, PCL struggles to penetrate the retail and housing market due to low brand awareness and competition from established brands like Attock Cement and Lucky Cement. The case follows Ali Salman, the aspiring marketing head, as he leads a team to evaluate PCL's brand position and develop a marketing strategy to increase brand awareness and market share in the retail sector. The timeframe for this case study was January to December 2023.

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IMBITITIVE TECHNOLOGIES – THE CHALLENGE OF A SUPERIOR PRODUCT

Navjote Khara, Brock University
Eric Dolansky, Brock University

Case Objectives and Use

This case is intended for an undergraduate business student general marketing course (likely the first or second marketing course taken by students in their program), or in an introductory marketing course in a graduate program (particularly one where students have less experience in the marketing area). Depending on the focus chosen by the instructor, this course could be used relatively early (if the focus is on general strategies and tactics) or relatively late (if the focus is more on the pricing). If used in a pricing course it is recommended that this case be placed early in the course, as it introduces not only the basic concepts around the role of pricing within a marketing plan, but also introduces tools - Value to the Customer analysis and the Price-Value curve - that can be explored in more depth and detail later in the course. Though some of the analysis, particularly the Value to the Customer Analysis, may go beyond what is typically taught in such a course, the key learning in this area of the relationship between price and value is an important foundational concept.

Case Synopsis

Imbibitive Technologies (IMBTEC) was manufacturer of a specialty absorbent, Imbiber Beads (IB), which were designed to capture, contain, and immobilize chemicals during a spill, facilitating easier cleanup. It was founded by Dr. Richard Hall and CEO John Brinkman who had acquired the intellectual property for the IB from The Dow Chemical Company in 1994. As compared to the conventional low-cost alternatives which cleaned spills like, in Brinkman's words, "a glorified rag," IB could swell up to 300% and comparatively absorb more volume of the contaminant. Additionally, the beads were less likely to release the chemicals back into the environment and had minimal secondary contamination and hazardous vapour release. In 2024 Brinkman was concerned that though IB had been an award-winning product with excellent customer feedback and a superior performance when compared to other spill prevention alternatives, the target customers were not buying the product as expected. There were many substitutes and competing products which made it difficult for IMBTEC to differentiate its offering in the market. The major challenges for IMBTEC were the perceived high price of the IB as compared to other spill response alternatives and the low awareness of the customer on its relative benefits. Brinkman wanted to find an effective way to get the information out to industry-at-large and educate it to the features and benefits of IB from an occupational safety and health perspective and also from an environmental perspective. How should he position the product? What should Brinkman do to improve sales, considering the high price of the product? What then was an appropriate price for IB, given the customers, competition, and company capabilities?

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FROM CHEERS TO CONTROVERSY: BUD LIGHT'S BRAND MARKETING CHALLENGES

Dr. Kevin McDermott, Conestoga College
Rob McLean, University of Waterloo
Vickie Quigg, Conestoga College

Case Objectives and Use

This case is suitable for undergraduate or graduate marketing students. It can be associated with learning outcomes related to strategic brand management, social media management, political risk and crisis management. Instructors may choose to use this case with students to facilitate the application of the three learning objectives: 1) analyze the effectiveness of a portfolio management strategy in maintaining brand equity during a crisis; 2) evaluate the decision-making process in strategic brand management when faced with public relations challenges; 3) identify and target market segments for the Bud Light brand to optimize influencer partnerships and minimize the risk of brand reputation damage.

Case Synopsis

This case describes the timeline of events from April 2023 until April 2024, exploring Bud Light's brand marketing challenges. Students are asked to retrospectively analyze the choices made by marketers of the popular beer in the United States, as it faced a significant decline in sales and brand reputation. The decline was primarily attributed to a social media marketing campaign involving a transgender influencer, which sparked political backlash and led to a boycott by certain consumers. Despite efforts to address the situation, including organizational changes and increased marketing expenditures, Bud Light's market share continued to plummet. The case raises questions about strategic brand marketing decisions, influencer partnerships, audience analysis, and crisis management, prompting a reflection on alternative strategies that could have mitigated the financial and reputational impacts faced by Anheuser Busch, the parent company of Bud Light.

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SAMSONITE'S MARKET PENETRATION AND STRATEGIC GROWTH IN INDIA

Megha Choudhary (student author), Shailesh J. Mehta School of Management, IIT Bombay
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Arti D. Kalro (faculty supervisor), Shailesh J. Mehta School of Management, IIT Bombay

Case Objectives and Use

This case is suitable for courses in Strategic Management, Marketing, Retail Management, and Business Strategy, targeting undergraduate, MBA, and executive MBA students. It addresses key issues such as market expansion, omni-channel retailing, crisis management, competitive landscape, and shifting consumer behavior. Students will develop skills in strategic analysis, crisis management, and understanding the integration of online and offline retail channels. They will also gain insights into market segmentation, targeting, leadership, and innovative problem-solving. The case provides practical examples of how a global brand like Samsonite navigates market dynamics, adapts to crises, and leverages leadership to drive growth and innovation, offering valuable lessons in applying business theories to real-world scenarios.

Case Synopsis

Mr. NP Singh, Director of Retail & Sales at Samsonite India, has significantly expanded the company's market share through strategic market exploration, innovative product designs, and overcoming challenges in retail space and distribution. Under his leadership, Samsonite has grown despite the rise of omni-channel retailing, D2C brands, and the COVID-19 pandemic, which drastically impacted sales. Singh's initiatives, including leveraging travel accessories for retail presence and transforming stores, have solidified Samsonite's position in high-traffic locations like Mumbai Airport. Since entering India in 1996, Samsonite has catered to diverse market segments with brands like American Tourister and Kamiliant, enhanced by strategic partnerships and sustainable products, ensuring continued success in the dynamically changing luggage industry. As Mr. Singh reflects on Samsonite's journey in India, he recognizes the critical need for a comprehensive omnichannel strategy to navigate evolving market dynamics. Balancing investments between online and offline channels, catering to price-sensitive consumers, and countering competition from low-end brands remain key challenges. Samsonite's ability to innovate, adapt, and embrace omnichannel retailing will be crucial for sustaining growth and profitability. In retrospect, Mr. Singh considers how an omnichannel approach might have eased initial hurdles, offering a seamless blend of online convenience and offline presence for smoother market entry.

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MODI TOYS: GROWING AND NAVIGATING A NICHE BRAND IN A GLOBAL MARKETPLACE

Grishma Shah, Manhattan College
Adeniyi D. Olarewaju, Maynooth University

Case Objectives and Use

The objective of this case is to understand the role of social media and digital marketing in a dynamic global market place and develop strategic recommendations and possible actionable items on how Modi Toys can leverage deep-rooted cultural practices to create a sustainable business model that withstands market fluctuations and allow it to capitalize on opportunities for global growth while preserving its core mission. The case of Modi Toys is highly relevant for understanding the challenges and opportunities associated with marketing culturally significant products in both domestic and international markets. It provides a unique perspective on how a niche product, deeply rooted in Hindu culture and traditions, can navigate the complexity of global markets. The case illustrates the importance of leveraging social media endorsements, digital marketing, and public relations to build brand awareness and drive sales, while also highlighting the potential limitations of these strategies. Furthermore, the case is unique in that it underscores the critical role of understanding consumer behavior within diaspora communities, where cultural and religious ties significantly influence purchasing decisions and brand loyalty. The expansion into international markets, particularly India, presents a fascinating study of market entry strategies and branding dynamics, especially within a secular nation where religious-based products may either be welcomed or rejected.

Case Synopsis

In late December 2023, Avani Sarkar, Co-Founder of Modi Toys, reflected on the brand's five-year journey. Modi Toys, founded in 2017 by Sarkar and her brother Viral Modi, offers plush toys and books rooted in Hindu culture. Their first product, Baby Ganesh, sold out within three weeks, and the brand has since expanded to sell nearly 40,000 items across 49 states and 27 countries. The brand aims to help parents and children connect with their cultural heritage through educational products, leveraging social media and storytelling to target millennial parents. Despite achievements like endorsements from celebrities Priyanka Chopra and Mindy Kaling, and listings in major retailers such as Target and Amazon in just five years and extensive PR, marketing, and product diversification efforts, Sarkar is perplexed as to why sales have stagnated at the end of 2023. The core dilemma is understanding why efforts have not led to sustained growth and identifying strategic focuses to drive future sales. Three key options are at the forefront: global expansion, though challenging, a continued focus on India, and focus on bulk sales with a possible rethinking of the energy and time invested in the brand, especially on Instagram.

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TAIGA MOTORS: AN EXPANSION STRATEGY TO SUSTAIN MARKET LEADERSHIP

Amir Taherizadeh, McMaster University
Hamid Etemad, McGill University

Case Objectives and Use

This case is designed to expose students to the complex process of internationalization within the rapidly growing market of sustainable power sports. Students are encouraged to explore why technology-based entrepreneurial firms like Taiga choose to internationalize. Additionally, the case requires students to address the questions of how to internationalize and where to expand. This case can be used in (technology) entrepreneurship, international business, international marketing, and strategic management courses at undergraduate, and graduate levels including (executive) M.B.A. programs. Students are anticipated to develop the capability to conduct a thorough critical analysis of the factors driving a firm's decision to expand internationally. Moreover, they will possess the skill to assess a diverse range of options pertaining to internationalization forms and location decisions. Additionally, students will have gained specific insights into the experiences of various firms and industries in the context of global expansion.

Case Synopsis

In 2015, McGill engineering students Samuel Bruneau, Paul Achard and Gabriel Bernatchez successfully designed and built the world's first electric snowmobile and founded Taiga Motors. The three cofounders not only aimed to enhance sustainability in powersport vehicles, but also to provide powersports enthusiasts with superior vehicles that would not have the drawbacks of traditional internal combustion engine models. Pursuing this mission they also built the world's first electric-powered personal watercraft. Taiga quickly gained recognition for its ground-breaking products, winning multiple prestigious awards for its innovations and progress. Moreover, the company has received extensive support from the Canadian Federal and Quebec Provincial governments in the form of subsidies. However, Taiga's navigation of challenges has been threatening its continuity. Taiga has experienced its sales falling behind forecasts, a very low return on sales, and incurring significant losses since its inception. The path to realizing Taiga's growth ambitions has been fraught with obstacles, including substantial losses, the limited size of the electric powersport market, and adverse macroeconomic conditions. Moreover, the looming possibility of major global competitors entering the electric powersport market could escalate competition, undermining Taiga's competitive position and jeopardizing its first-mover advantage. Trying to ensure the company's survival, Taiga Motors' leadership is considering an international strategy for expansion to increase sales and production to sustainable levels.

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RABLO: THE CHALLENGE OF COMMERCIALIZING AN AI SOLUTION

Antonio Casanueva, IPADE Business School
Silvia Cacho-Elizondo, IPADE Business School
Carlos Castellanos, IPADE Business School

Case Objectives and Use

The primary learning objective is to analyze the commercialization of an innovative Generative Artificial Intelligence (GAI) product. The case can be used both in an MBA program and in an executive program to discuss topics related to commercial innovation and appropriate Go-to-Market strategies. It can also be used in innovation programs for senior management, or for entrepreneurs who want to delve into GAI and the challenges of designing and bringing these products to market.

The case aims to help students evaluate market segmentation and targeting strategies specific to innovative products like Rablo, and to design effective pricing strategies and distribution channels to maximize the adoption of innovative products in emerging markets. As a result of preparing and discussing the case, students will explore the critical intersection of marketing and innovation management.

Moreover, the case will help students to compare different business models and organizational structures applicable to the commercialization of emerging technologies. It will also help students explore the transformative potential of artificial intelligence in traditional sectors such as manufacturing and automotive, focusing on efficiency improvements and process automation.

Case Synopsis

Rablo, an innovative GAI solution, emerged from an intrapreneurship process within CompuSoluciones, a technology wholesaler with nearly 40 years of experience in the software and hardware market. The case presents dilemmas related to the definition and execution of commercial strategy, leadership, and positioning in the GAI market, in Mexico.

In March 2024, the main challenge for Rafael Flores, head of Laboratorio Emprende and creator of Rablo, was to design an effective marketing strategy for this potentially disruptive and scalable GAI solution. Although Rafael believed he had a clear target segment, the case data suggests that he might have identified only an initial market, with the primary market yet to be determined. Additionally, there were doubts about the pricing strategy, promotion, and the required distribution channels.

Furthermore, the directors of CompuSoluciones faced the challenge of finding a new head for Rablo, allowing Rafael to focus on generating new, monetizable GAI applications. Rablo's survival, without the direct involvement of its creator, raised questions about the app's future.

At a strategic level, CompuSoluciones aimed to position itself as a leader in GAI in Mexico. Was Rablo a potential example of the right path to achieve this goal? This case allows for the analysis of market entry strategies, emerging business models, and the impact of leadership on the adoption of innovative technologies.

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JOHNSON & JOHNSON: DEFENDING LEADERSHIP IN A CRISIS

Gustavo Calatrava, IAE Business School
Tomás Bouthemy, IAE Business School

Case Objectives and Use

This case can be used in introductory MBA marketing courses, as well as in executive education program modules related to product portfolio strategy and marketing planning. This case study is addressing the following topics:

- a. Be able to identify and evaluate possible alternatives to define a product portfolio.
- b. Key elements to manage efficiently a product portfolio.
- c. Design and formulate marketing strategies for competing in a crisis context.
- d. Learn economic-financial concepts to use them in scenario projections (margins, commercial investments, cannibalization, etc.).

Case Synopsis

In late 2019, amidst an economic crisis in Argentina, Johnson & Johnson's iconic brand "Siempre Libre" faced significant challenges in the female pads category. Consumers, impacted by the constant loss of purchasing power, turned increasingly to cheaper brands. As a result, the category risked becoming commoditized. Ernesto Clarence, the Marketing Director, needed to decide the best strategy to defend the brand's market position. Options included lowering prices, increasing marketing investments, or launching a budget brand. The Board gave him one week to present a proposal.

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DISTRIBUTION AT STELLARLUBE: SLOW AND STEADY IS THE WINNING STRATEGY. OR IS IT?

Renuka Kamath, S. P. Jain Institute of Management and Research

Case Objectives and Use

This case is suitable for use in MBA and graduate-level management programs. It can be useful in Sales Management, Channel Management, and Strategic Marketing courses. It highlights the challenges encountered when changes are explored in a market leader's existing distribution (channel) system to explore transformative growth. Instructors can use the case to demonstrate the choices between the resources deployed in distribution channels and the control (or lack thereof) a large multinational company must contend with. The case helps students assimilate the nature of outsourcing to intermediaries, factoring in channel conflict. It helps put in perspective that market leaders need to continuously find the next level of growth. After completion of this case, students will be able to:

- Understand the dynamic business environment for the automotive lubricant industry that a market leader has to consider for its growth.
- Assess the impact of changing consumer behavior and managing the change in a large and complex salesforce structure.
- Understand the fundamentals of indirect sales route-to-market and design innovative ways of disruption.
- Evaluate various options for transformative growth by managing anticipated conflicts.

Case Synopsis

Anubhav Mittal, Director of Sales at Stellarlube India Limited (Stellarlube), headquartered in Mumbai, India, was worried about the company's future preparedness. He had been visiting and assessing the market the past few months when the Covid-19 pandemic brought the world to its knees. By May 2020, Mittal was concerned about the plans of transformative change he wanted for Stellarlube, an innovative company in its approach to business. With its strong distribution network and digitized TechStack, Mittal and his sales team ensured efficiencies in dealing with its trade partners - distributors, dealers, and mechanics. Mittal had been traveling, meeting Stellarlube distributors, their Distributor Sales Representatives (DSRs), the Distributor Field Marketing Representatives (DFMR), and the Key Account Executives (KAEs). Mittal was concerned if the three frontline sales teams worked together and leveraged each other's strengths and that he didn't have flexibility in their deployment. In addition, the distributors were vocal about lowering ROI in the Stellarlube business.

With the Government and consumers driving changes in the transition to low-carbon energy systems, Mittal knew that StellarLube would soon have to execute one of the options – first, to make incremental changes in Tech and deployment of the sales force, or second, get an autonomous, independent team to look at sales operations completely anew with a ground zero approach or the third option of venturing into a disruptive, risky, yet an innovative option of hiring a specialized third-party sales solution provider and outsourcing the distribution. Each option had its complications, risks, and rewards. Which one would have minimum conflict and be best implemented?

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Organizational Behavior/Human Resource Management Cases

Track Chair: Jyotsna Bhatnagar, Management Development Institute

Co-Chair: Meredith Woodwark, Wilfrid Laurier University

Table 1

Session Chair: Meredith Woodwark

Cases	Authors
Crystalize with Huawei's Transformation – Hellen's Musical from Becoming to Being	Zheni Wang
It's Just a Joke	Jasmin Lin Daisy Wang Vicky Nie Bruce Thomson
The Maternal Wall	Courtney Shields Jasmin Lin Daisy
Money for Nothing!	William Carty Marko Horn
Take a Load Off Mannie: The Weight of Occupational Health and Safety Experiences in the Construction Skilled Trades	Arica Oliver Mark Julien
Unlocking Multiversity Potential A Case Study in Transformation - Qatar Foundation	Deval Kartik Tomas Farchi
What's in a Title?	Ashley Stebbins Jasmin Lin Vasilios Scoumis

Table 2
Session Chair: Juan Parra

Cases

Augmenting Employee Engagement Through Generative AI- Case of Infeedo

ICare Inc. Needs Immediate Hire

Owners Not Renters: Should Our Employee Owners Sacrifice for a Better Future?

Passing The Baton: Bert Hash's Legacy of Leadership At MECU

Should We Terminate this Employee? An Organizational Justice issue in a Social Justice Organization

Workin' (Not Just) For a Living: A Career Plan for a Blue-Collar Worker

Authors

Sushmita Srivastava
Shailaja Jha

Guorong Zhu
Chloe Browning

Charles Onstott
Daria Efimova

Maya Kirkland
Kyler McGillis
Karen Proudford
James Calvin

Jason James

Juan Parra
Liliana Diaz

CRYSTALIZE WITH HUAWEI'S TRANSFORMATION – HELLEN'S MUSICAL FROM BECOMING TO BEING

Zheni Wang, Southern Connecticut State University

Case Objectives and Use

This case aims to teach students about self-regulation and motivation (self-concordance goal model) and coaching (GROW model) in HR management, organizational behavior, and international business. It is best suited for advanced undergraduate courses in organizational behavior, HR management, international business, and MBA courses covering these topics.

Case Synopsis

This case summarizes the career path of Ms. Hellen Chen, the former compensation and benefits director of Huawei. Huawei, a leading Chinese technology firm established in the 1980s, carved its name with a customer-centric business model into continuous innovation and sizable internationalization over the past 20 years. As a courageous and independent HR professional facing career dilemmas, Hellen actively sought challenges to join and rejoin Huawei for self-concordance. Given the trust and resources from Huawei's senior executives to shape the overseas HR policies and the integrated HRM platform, Hellen exceeded their expectations and elevated herself to a self-determined HR leader for Huawei. Hellen also formed a unique coaching style matching Huawei's employee-centric corporate structure and transformative ecosystem for growth into the future.

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IT'S JUST A JOKE!

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Daisy Wang, East Stroudsburg University
Vicky Nie, City University of Seattle
Bruce Thomson, MacEwan University

Case Objectives and Use

The case is suitable for undergraduate level or graduate level Human Resource Management (DEI or harassment issue), Organizational Behavior, or Introduction to Management courses. Different levels of discussion are provided in the teaching notes.

1. BA (LO1/2/3)
2. MBA level, add (LO4)

The case provides students with the chance to examine the significance of Diversity, Equity, and Inclusion (DEI) in higher education and its integration into social and learning activities. Specifically, students will analyze the distinction between humorous and harmful behaviors within NTU's student election framework under the DEI lens, while considering the potential career repercussions. The case also encourages the application of various theories to comprehend the issue comprehensively. Instructors have the flexibility to select one or multiple learning objectives tailored to the course level or topic.

After working through the case and assignment questions, students should be able to

(LO1) Recognize and address discrimination's harmful effects on individuals and communities.

(LO2) Explore how group identities influence behavior and apply strategies to promote positive interactions and reduce prejudice. Social Identity Theory/Self-Categorization Theory for group dynamics and inclusion.

(LO3) Learn how cultural differences impact attitudes toward diversity and implement inclusive practices across diverse cultural contexts. Hofstede's Framework for culture and diversity.

(LO4) Understand how people learn attitudes toward diversity and prevent moral disengagement to ensure fair treatment. Bandura's Social Learning Theory and Moral Disengagement Theory.

Theoretical Basis:

1. Social Identity Theory/Self-Categorization Theory
2. Hofstede's Culture Framework
3. Bandura's Social Learning Theory (Diversity management) Moral Disengagement Theory

Case Synopsis

In May 2023, National Taiwan University (NTU) encountered controversy when two students running for the Student Association presidency posted discriminatory statements during their campaign. Dr. Su, a professor, raised concerns about the severity of the remarks and their implications. Despite attempts to rectify the situation, including apologies from the candidates and revisions to campaign materials, the incident sparked discussions about freedom of speech, campus culture, and the responsibility of educational institutions.

Keywords: Student Association, Offensive Speech, Discriminatory Speech, Unintentional discrimination, and Diversity, equity, & inclusion.

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 2024 Conference, Orlando, Florida, USA, October 17-19, 2024. © 2024 by Jasmin Lin, Daisy Wang, Vicky Nie, and Bruce Thomson. Contact person: Jasmin Lin, Robert Morris University, 412-397-5488, lin@rmu.edu.

FORGET ABOUT THE GLASS CEILING, LET'S TALK ABOUT THE MATERNAL WALL

Courtney Shields (student author), Robert Morris University
Dr. Jasmin Lin (faculty supervisor), Robert Morris University
Dr. Jasmin Lin (faculty supervisor), Robert Morris University

Case Objectives and Use

This case explores the maternal wall bias and the issues facing working mothers. Upon completing analysis of this case study, students will be able to 1) understand the factors underlying the maternal wall and its ripple effects, including conscious and unconscious bias and potential discrimination, 2) make strategic recommendations for Human Resource teams to promote better diversity, equity, and inclusion (DE&I) policy in the workplace to mitigate the maternal wall and 3) provide tactics for employees to prevent career fallout from the maternal wall and begin to break social barriers. This case would be appropriate for a course in Diversity, Equity & Inclusion, Human Resource Management, and Organizational Behavior with a focus on Gender, Family, and Workplace Issues. Students should be familiar with human resource management practices. It is also beneficial for students preparing to enter the workforce who would gain an understanding of this type of discrimination before experiencing or perpetuating it themselves. Themes that will surface in this case are the Maternal Wall, Maternity Leave, Motherhood Penalty, Fatherhood Bonus, Gender Discrimination, Gender Hiring & Promotion Bias, Social Stereotypes and Wage Gap.

Case Synopsis

Mary Beth Ferrante, a successful executive at Global Solutions, faced the maternal wall when she announced her pregnancy. Previously excelling in her career, she encountered subtle and overt biases from colleagues, struggling to balance motherhood with her career aspirations. Despite her dedication, she was denied promotion due to her focus on home responsibilities. The challenges of navigating motherhood while sustaining her career, including juggling nursing responsibilities and facing public commentary on her work-life balance, led to her resignation. Key moments, such as her boss's disapproval of her taking full maternity leave and facing barriers upon returning to work, highlight the systemic biases she encountered. This case highlights workplace biases like the maternal wall, motherhood penalty, and fatherhood bonus, revealing broader issues of gender discrimination and leadership inequality. Implementing strategies to address these biases could have helped retain her talent, emphasizing the need for inclusive workplaces.

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MONEY FOR NOTHING!

William Carty, Mercer University
Marko Horn, Mercer University

Case Objectives and Use

1. Describe the purpose of bonuses and their impact on employee motivation.
2. Summarize the importance of clear policies and procedures in Human Resource Management
3. Compare and contrast strengths and weaknesses of a bonus system.
4. Develop an effective bonus policy and structure.
5. Discuss the challenges a company experiences in the post-acquisition integration process.

Relevant Courses:

Strategic Management, Organizational Behavior, Human Resource Management, Leadership

This case has the potential for several undergraduate and graduate applications. As a Human Resource case the instructor could focus on the fairness and legality of bonus structures, while an application in an Organizational Behavior class could focus heavily on employee motivation and motivational theories in application. Strategic Management discussions can be centered on organizational structure considerations, and on the violation of the “unity of command” principle in matrix structures. In addition, focus can be given to how these theories apply in a business setting as overseen by human resources departments.

Before using the case, students should read about compensation in general and merit-based incentives. Students should read about mergers and acquisitions, leadership and, motivation. Students can exercise critical thinking by discussing in class the purpose of bonuses and their effectiveness and alternatives to bonuses to achieve motivation and recognition. Working individually or in groups, students can gain practical skills developing a bonus policy and a bonus structure that achieves the goals of the policy. Students can also discuss the importance of understanding program and organizational culture differences in mergers and acquisitions focusing on understanding and reconciling policy gaps and differences.

Case Synopsis

A new executive, Sarah, must address an emerging personnel problem in a newly acquired corporate security company. Sarah has been the new Assistant Vice President for Services at SECWORLD’s South Carolina headquarters for two months. Retained employees have expressed concern over a legacy bonus process that the new corporate management must rectify to maintain motivation, trust and confidence of the workforce. The events surrounding this case took place in November 2015. It is set in the newly acquired company’s South Carolina headquarters. This case examines issues related to strategic decisions in acquisitions, organizational culture, organizational structure, and human resource planning.

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TAKE A LOAD OFF MANNIE: THE WEIGHT OF OCCUPATIONAL HEALTH AND SAFETY EXPERIENCES IN THE CONSTRUCTION SKILLED TRADES

Arica Oliver (student author), Brock University
Dr. Mark Julien (faculty supervisor), Brock University

Case Objectives and Use

Course Types: Occupational Health and Safety, Introduction to Human Resources Management

Target Students: Undergraduate, Graduate (Introductory Courses)

Topics: Occupational safety, supervisor support, safety culture, human resources management (performance management, training, recruitment/selection, compensation), construction skilled trades

Skills/Insights: Students will (1) discover the importance of safety in organizations; (2) identify how internal factors (e.g., co-workers, supervisors, and organizational culture) and external factors (e.g., environmental hazards, protective equipment) can both positively and negatively influence a worker's safety experiences; and (3) understand the potential for disconnects to exist between safety legislation and workers' reality. Students will also (4) assess the interconnectedness of human resources management and be able to suggest design improvements to a workplace's recruitment/selection, training, performance management, human resources policies, or compensation in order to improve its safety culture. Lastly, students will (5) create a recommendation and advise the protagonist on what they should do to improve their occupational safety experiences.

Purpose: This case intends to highlight the significance of safety in workplaces and the drastic impact a poor safety culture can have on a worker's mental and physical health in order to teach students to prioritize workers' safety when they become future leaders and managers in their workplaces.

Case Synopsis

This case follows the work experiences of Mannie Dylan, a young construction skilled trades worker employed at his first company. In January 2021, Mannie began working as a heating, ventilation, and air conditioning (HVAC) technician at *Nobel's Home Heating*. Some co-workers helped to mitigate his negative work experiences, but his supervisor/boss, Robert Nobel did the opposite. In March 2022, Robert merged his operations with an acquired competitor so that his technicians would alternate being on-call 24 hours a day, 7 days a week, for one week at a time. In reality, Robert only scheduled Mannie and allowed the other main technician to give chronic excuses and be "rescheduled." This caused Mannie to be on-call for six consecutive months. Over those months, he had been facing growing mental and physical challenges in his workplace. After a workplace incident in October 2022, he began to re-evaluate his employment situation and sought advice on what to do from his significant other – a business student studying occupational health and safety (i.e., student role).

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UNLOCKING MULTIVERSITY POTENTIAL A CASE STUDY IN TRANSFORMATION – QATAR FOUNDATION

Deval Kartik, HEC Paris in Qatar
Tomas Farchi, HEC Paris in Qatar

Case Objectives and Use

The case is best suited for MBA and Executive MBA levels. It can be used most effectively in custom or open programs in organizational behavior, innovation, and collaboration topics. The students will be able to:

1. To understand the concept of Open Innovation and how it can work in organizations.
2. To develop a shared purpose.
3. To bust departmental silos.
4. To overcome conflict and turf wars.
5. To prevent collaborative overload and fatigue.
6. To use the right tools for virtual information sharing.

Case Synopsis

It was May 2022. The initiative started by the City Operations team had come to a status quo after a high level of engagement when it began.

In October 2020, the City Operations (CO) division of the Qatar Foundation launched an initiative to generate participation from its employees to contribute ideas for improvement in their offerings. The ideas could be in Sustainability, Cost Improvement, Customer Relationship Management, and Business Improvement. The CO team had 158 employees, and the core team was certain that they had a grasp of the ground reality and would be able to suggest several ideas that would help improve their services across the large, multi-facility organization. To facilitate the idea generation process, a digital idea box was created and launched, updating all the divisions and employees on its availability and the process for submission of ideas. Simple forms and flowcharts were designed, and an innovation committee was set up for easy submission and quick evaluation of the ideas. In the initial months of the launch, several strong ideas resulted in cost savings, sustainability, and improved customer relationships. The ideators' contribution was recognized and rewarded in a special ceremony.

However, as time passed, the enthusiasm seemed to be waning. The ideas started to slow down and almost became a status quo by April 2021. Hamad Al Kuwari, Executive Director of the CO, called a meeting with Mohammed Al Khaldy, Saket Chaudhary, and Saleem Al Yafei, the key members behind the Idea Box, to take their views on the plan ahead. Could it be possible that the employees had lost motivation? Why had the ideas flow ebbed, and what could be done to revive the Idea Box?

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WHAT'S IN A TITLE?

Ashley Stebbins (student author), Robert Morris University,
Vasilios Scoumis, Manchester Academic Charter School
Jasmin Lin (faculty supervisor), Robert Morris University

Case Objectives and Use

The case can be used in an undergraduate course for Human Resource Management (such as topics on Diversity, Equity, & Inclusion (DEI), and Employee Rights) or Organizational Behavior courses (such as topics on communication or conflict and negotiation).

Learning Objectives: After completing this case, students were able to

LO1. Demonstrate comprehension of gender identity and preferred pronouns, including the significance of using gender-affirming pronouns, and engage in respectful discussions on the topic. (HR)

LO2. Learn the importance of respecting other's identities and the impacts of using incorrect pronouns on individuals' well-being. Apply Social Identity Theory and Social Learning Theory to analyze the case (HR, OB)

LO3. Apply relevant federal and state laws to scenarios, considering established precedents and best practices in utilizing pronouns within professional and academic contexts. (HR)

LO4. In a more advanced course, apply conflict resolution strategies or negotiation skills. (OB)

Keywords: teachers, non-binary, DEI policy, honorifics, preferred pronouns, misgendering, LGBTQIA+ Theories can be used in analyzing this case.

- Social Learning Theory: People learn from observing others. For example, kids develop attitudes and behaviors regarding gender identity and pronoun usage first from their parents or family members, then the school setting, and then the news or community.
- Social Identity Theory: Individuals categorize themselves and others into social groups, and their self-esteem is tied to the status of the groups they belong to.
 - Why did this kid refuse to call the teacher Mx. L? Analyzing the dynamics of identity and group membership in the context of gender identity can provide insights into the refusal to use preferred pronouns.
- Conflict Theory: Conflict theory examines how power imbalances and social inequalities contribute to conflicts between individuals or groups.
 - Analyzing the power dynamics at play in the student-teacher relationship and how they intersect with gender identity can provide a framework for understanding the refusal to use preferred pronouns. What strategies can be adopted for conflict resolution?

Case Synopsis

Mr. S, the CEO of a Charter School faced a dilemma in 2023. He hired Mx. L, a non-binary person who preferred to be referred to as Mx. L. While Mr. S and the staff at the Charter School are supportive of this request, one of the students, G, a fifth grader, was refusing to call Mx. L as requested. She caused a scene, insisting on misgendering them by calling them "she" and announcing that she only knew of two genders. Understandably, this was troubling for Mx. L. They sat down with Mr. S and Ms. B, the Head of HR, to discuss what had occurred and what could be done to ensure this doesn't happen again in the future. With little precedent to follow, Mr. S and Ms. B have some tough decisions to make. Will they support Mx. L and potentially suffer backlash from parents or other students or will they decide to sweep this under the rug?

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AUGMENTING EMPLOYEE ENGAGEMENT THROUGH GENERATIVE AI – CASE OF INFEEDO

Sushmita Srivastava, SP Jain Institute of Management and Research
Shailaja Jha, SP Jain Institute of Management and Research

Case Objectives and Use

The case focuses on the adoption challenges of Employee Engagement platforms. The case raises issues with respect to barriers to adoption by organizations and also assesses ROI of a Gen AI enabled products in the Employee Engagement space. Students can be asked to offer recommendations for mitigating risks through highlighting the benefits of Generative AI. They would also build perspectives on how to address employee expectations with advances in technology like Generative AI.

Case Synopsis

Amber, an AI Chatbot Listening platform of Infeedo had been a successful product in the market for over 7 years and had met with resounding success in the Employee Engagement domain. With Generative AI making its inroads in March 2023, Infeedo introduced the AI Assist and AI Engagement with advanced features beyond the functionality of the Amber Chatbot, in order to leverage the advancements in AI technology.

The dilemma in the mind of Varun Puri, Co-founder and Chief Product Officer was how to enhance the value perception of new product offerings, so that customers effortlessly migrate from Amber Chatbot to AI Engagement and AI Assist platforms and that the adoption barriers of a generative AI rich product fades away. Implicit in the dilemma - is the desire to ensure that larger parts of the organization are brought into the ambit of their product and that the product should be perceived as valuable by the organization.

Varun Puri was apprehensive that if he does not create the value perception fast, Infeedo may lose the early market advantage. The key question was how to persuade the clients to migrate from Amber to a broader product offering that AI-Engagement and AI-Assist represent? Which clients should Varun Puri focus on, the old customers of Infeedo, or new untapped customers.?

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ICARE INC. NEEDS IMMEDIATE HIRE

Guorong Zhu (faculty supervisor), Salem State University
Chloe Browning (student author), Massachusetts Department of Developmental Services

Case Objectives and Use

This case is designed for use in undergraduate or graduate-level courses in Organizational Behavior, Human Resources Management, or Strategic Management. It aims to foster classroom discussion and support both online and face-to-face instruction on strategic management decision-making. In the context of strategic management, it focuses on cost and benefit analysis of business expansion and resource allocation in business operations. Within Human Resource Management, it covers employee recruitment, engagement, and retention. Moreover, the case is highly relevant in Organizational Behavior courses that explore external environmental factors such as the Covid-19 pandemic and internal strategies for organizational success. Educators who utilize critical thinking approaches to investigate decision making, business strategies, cost-benefit analysis, strategic human resource management, and employee engagement can effectively use this case to explore topics such as social-political environments, competitive industry dynamics, labor market changes, external recruitment, and talent management.

Case Synopsis

This case focuses on Chloe Browning, the Division Director of Residential Services at ICare Inc., a non-profit organization providing lifelong support to people with disabilities. Chloe is grappling with the consequences of a staffing shortage that is impacting the organization, compounded by low pay and the emotionally demanding nature of the job. Adding to her challenges, the CEO requests that she take advantage of state incentives and open new services within the next 6 months.

The case outlines Chloe's background in direct care and her commitment to making a positive impact on the lives of those receiving care. It also highlights ICare Inc.'s mission and the challenges the organization is facing in the human services industry, including the staffing shortage exacerbated by the Covid-19 pandemic and the "Great Resignation" phenomenon (Fall, 2022). The case concludes with Chloe reaching out to the Human Resource Director to address the staffing shortage while considering the CEO's requests for business expansion.

This firsthand experience-based case presents the management challenges that businesses encounter in terms of employee recruitment and retention, as well as the strategic decision of whether to expand the business considering government incentives and organizational constraints. It is designed for undergraduate and graduate students enrolled in Organizational Behavior, Human Resources Management, or Strategic Management Courses.

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OWNERS NOT RENTERS: SHOULD OUR EMPLOYEE OWNERS SACRIFICE FOR A BETTER FUTURE?

Daria Efimova (student author), Virginia Tech
Charles Onstott (student author), Virginia Tech

Case Objectives and Use

This case study is designed for use in management, organizational behavior, and strategy courses, specifically targeting MBA or executive MBA students. It provides a multifaceted examination of the strategic, operational, and cultural challenges faced by CALIBRE Systems Inc., a 100% employee-owned company operating in the government consulting services market. The case covers key decisions related to an annual financial planning process given strategic execution issues resulting in leadership challenges in the context of an employee-owned company. This case will help students develop skills related to strategic decision-making using the dynamic capabilities theory, organization behavior by assessing whether and how employee-ownership might impact employee morale given a difficult decision regarding company-wide compensation changes to support the company's strategy.

Case Synopsis

In September 2023, CALIBRE's CEO, Richard Pineda, stood at a crossroads as he prepared to present CALIBRE's 2024 plan and budget to the company's Board of Directors. CALIBRE's Strategy 2025, aimed at pivoting the company towards digital transformation, was under scrutiny due to increasing debt and flat revenues. Continuing to execute the strategy in 2024 required significant personal and financial sacrifices from employees, sparking a critical decision point for the leadership team.

CALIBRE was an employee-owned medium sized company in the U.S. federal government contracting market. The market is characterized by intense competition and heavy regulation, requiring companies to demonstrate expertise, innovation, cost-effectiveness, and reliability to win contracts. CALIBRE faced competition from both small businesses benefiting from "set-aside" contracts (i.e., contracts for which only small businesses can compete) and large firms with broader capabilities and resources. The company aimed to carve out a niche by emphasizing accountability, flexibility, and speed. As Pineda and his executive team debated the best path forward, they grappled with the potential consequences of their decisions on CALIBRE's future, its financial health, and the morale and engagement of its employee-owners.

Pineda faced three primary challenges: Deciding whether to continue with the ambitious digital transformation strategy; sustaining the ESOP while seeking to avoid layoffs and maintain employee morale; balancing the needs and expectations of employee owners, who were integral to the company's culture and success.

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PASSING THE BATON: BERT HASH'S LEGACY OF LEADERSHIP AT MECU

Maya Kirkland (student author), Johns Hopkins Carey Business School
Kyler McGillis, (student author), Johns Hopkins Carey Business School
Dr. Karen Proudford (faculty supervisor), Johns Hopkins Carey Business School, Morgan State University
Dr. James Calvin (faculty supervisor), Johns Hopkins Carey Business School

Case Objectives and Use

The case addresses leadership theories, community engagement, and strategic innovation. Students will develop insights into effective leadership, strategic planning, and aligning technological advancements with community-focused values to achieve sustained growth and relevance in the financial industry.

The objectives are:

- Review three of the major leadership theories: transformational leadership, servant leadership, authentic leadership
- Explore ways in which leadership approaches shape organizational culture and strategy
- Consider the link between the leadership approach and the organization's context
- Consider the importance of the leader's role in succession planning

Case Synopsis

This case focuses on the importance of leadership transitions and strategic decisions that advanced a municipal credit union and its people. Bert Hash reflects on his tenure as CEO of the Municipal Employee Credit Union (MECU) in Baltimore. He successfully navigated MECU through a period of substantial growth and transformation from 1996 to 2014. At the time of his appointment, MECU had one branch, a limited number of employees, and \$400M in assets. By the time of his retirement in 2014, MECU had expanded to 11 branches, employed numerous staff, and had grown its assets to over \$1.3 billion. In order to accomplish this, Hash had worked closely with Board members, employees and the community – reshaping the way in which they interacted with one another. Stakeholders responded to his engaging, focused and principled leadership style. MECU expanded existing markets, envisioned new ways of furthering its reach into the community, embraced new technology, and served as a role model for credit unions in Baltimore and around the country.

Hash knows the challenges of navigating an organization through fundamental and far-reaching change. Moreover, he is aware of the difficulties of sustaining change – particularly through a leadership transition. As he reflects on the journey, Hash thinks about what (else) he can do as he prepares to leave the organization, in order to help ensure that the new CEO and leadership team can continue to move MECU forward.

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SHOULD WE TERMINATE THIS EMPLOYEE? AN ORGANIZATIONAL JUSTICE ISSUE IN A SOCIAL JUSTICE ORGANIZATION

Jason James (student author), Virginia Tech
Janis Gogan (faculty supervisor), Virginia Tech

Case Objectives and Use

This case is targeted for Organizational Behavior and Human Resources Management courses. Students who will be interested in this discussion will be MBA/Executive MBA students who need to learn critical thinking and risk management skills.

In this case, students will be exposed to risk management, employee equity, maturing organizational structure, organization reputation management, and community engagement impact on the work done in the community. Students will learn how to see beyond the immediate visible problems in the case. Students will be challenged to take a holistic view and see the problem from multiple viewpoints. These vantage points may then influence a solution that deploys risk management measures at different levels of the problem to achieve long-term and short-term goals for all the stakeholders involved, the organization, management, the employee, and the community.

Case Synopsis

Harmony Initiative (HI), a Milwaukee-based social justice organization, sponsors and supports marginalized communities whose leaders want to promote social justice, consistent with its overarching goal to support grassroots actions to foster justice equity, and empowerment. HI helps organizations obtain funding and grants through fiscal sponsorships. HI also helps organizations manage their funds and provides administrative and operational support, until those local organizational leaders can apply for and receive their own 501(c)(3) designations for their organizations.

In late September 2023 Brittany Lions, a Human Resources Manager at Milwaukee-based Harmony Initiative (HI), a grant-making organization dedicated to fostering equitable, community-driven social justice initiatives, was contemplating an HR dilemma. That morning, Lisa Smith, an HI Executive Director, asked Lions to help solve a problem involving an underperforming employee. Lions recognized that the options under consideration, which were whether to terminate the employee, negotiate a new role, or manage the employee more closely in the current position, needed to be carefully thought through. If handled badly, this situation could have legal, financial, reputational, and/or employee moral consequences.

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WORKIN' (NOT JUST) FOR A LIVIN': A CAREER PLAN FOR A BLUE-COLLAR WORKER

Juan M. Parra (faculty supervisor), INALDE Business School
Liliana Diaz (student author), INALDE Business School

Case Objectives and Use

This case was originally developed for MBA and Executive Education programs, but it could also be useful for undergraduate and MBA programs. It is suggested for use in courses on the fundamentals of human resources management, particularly in modules on talent development, with special consideration for the career development of blue-collar workers. The case could also be useful in OB courses in modules related to motivations.

After discussing this case, participants will be able to:

1. Determine *what career success means* to blue-collar workers
2. Analyze *how motivations can influence* career decisions and shape the perception of success as circumstances change.
3. Clarify why *supervisor support and socialization processes* are necessary for internal transfers and promotions processes, especially when they involve considerable changes for an employee

Case Synopsis

In September 2021, Víctor Alzate, National Procurement Leader within the Shared Services Unit (USC), was determining the next person to join his team. Alzate had been working for six years at Nakama Industries, a major Colombian manufacturer, and had been promoted to a more complex role with people management responsibilities for the first time seven months ago. Alzate had long awaited this promotion, and he had found the opportunity due to his status as a "high-potential employee."

Alzate decided to bet on Benjamin Cruz, a good plant operator who wanted to move from the operational line to an administrative role, but Alzate had to convince his strategic partner in the Human Resources area, who had issued some warnings about the risks of such a move. And, although he had two other younger external candidates, he also remembered the words of the Vice President of Human Resources: "We must always bet on our internal talent." Therefore, Alzate was excited about this unconventional move, as it could help Cruz—who had recently graduated as a professional engineer after great effort—fulfill his growth dreams and offer him a new career with long-term opportunities that were not as clear otherwise. He was reassured not only by Cruz's own conviction about his decision but especially by the time Alzate would save in terms of the learning curve and cultural fit, which in this case seemed unnecessary.

HR insisted on closing the process that same week, and Cruz was expecting a prompt response. However, they alerted Alzate that this move did not represent a significant improvement in Cruz's salary conditions and that he would lose some benefits (e.g., overtime pay, protection under the collective agreement, etc.), which could eventually risk frustrating rather than motivating a great employee.

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Social Impact and Sustainability Cases

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

Table 1

Session Chair: María Ballesteros-Sola

Cases	Authors
Veritas, a Supermarket Competing with Purpose	Alfred Vernis Veronica Devenin
Just Because You Want to Change the World, it Doesn't Mean You Have to Start a Nonprofit	Claudia Barrulas Yefremian
Expansion or Consolidation: The Case of the Boys and Girls Club of Tijuana, Baja California, Mexico	Manuel Ruiz Paez Gabriela Ruiz Paez Roberto Iván Fuentes Contreras
ACS Clothing: Enabling Fashion Brands and Retailers to Join the Circular Economy	Marie-Cécile Cervellon Lindsey Drylie Carey Aileen Stewart
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VERITAS, A SUPERMARKET COMPETING WITH PURPOSE

Alfred Vernis, ESADE-Universitat Ramon Llull
Veronica Devenin, EADA Business School

Case Objectives and Use

This case is designed to be used in introductory Strategy courses in BBA or MSc programs, to discuss how to compete with purpose. It can be used to introduce what B Corps are and what the B Impact Assessment is. It can also aid understanding of how companies that a positive social and environmental impact have can defend themselves against the rise of “greenwashing.” The case works very well after students have understood the basic concepts of strategy and sustainability. If needed, the case *Veritas: the first “real food” supermarket* (CRJ, NACRA, 2019) can be used as a precedent.

The case can also be used with other audiences such as MBA or Executive Masters courses. The case can help raise awareness of companies that advance the cause of sustainability and be applied to delve into the dilemmas surrounding competitive strategy-building based on long-term sustainability.

Case Synopsis

In 2024, Veritas, the leading Spanish chain in organic supermarkets, had redefined its purpose. It announced that it intended to compete in the coming years based on a new business philosophy. Since its birth in 2002, it had enjoyed uninterrupted growth, right up to becoming the leading organic supermarket in Spain. Currently it has more than 77 stores, plus an online channel. In 2022 it had a turnover of more than €100 million.

Now, Silvio Elias, president and co-founder of Veritas, was aware that they were beginning a new stage. The competitive environment of the Spanish organic food market had changed. In recent years, several traditional supermarket chains had incorporated organic produce, and other supermarkets were heavily engaged in ‘greenwashing’ – advertising themselves as environmentally-friendly, regardless of the reality.

Realistically, could Veritas compete with “purpose”, creating a positive impact and increasing its differentiation? Since 2016 (when they became Europe's first B Corp-certified supermarket), the company had learned a lot from impact certification and from its peers in the B movement. To what extent could a certification such as B Corp help Veritas ahead of other supermarkets that were doing “greenwashing”? Would consumers be able to understand the purpose of Veritas, and would certification help? Or perhaps, now that Veritas already has a consolidated position, it's time to expand the niche it targets. Why not broaden the range of products and introduce into the supermarket those items that, without having the ecological seal, are good for health and have high demand from consumers. After several years of increased inflation and higher food prices therefore first of the Covid Pandemic and later because of war in Ukraine, his would allow it to compete with large supermarkets by being able to offer a cheaper price on some products and expand its customer base. Wasn't it time to stop being so 'fundamentalist' about ecological products?

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 2024 Conference, Orlando, Florida, USA, October 17-19, 2024. © 2024 by Alfred Vernis & Verónica Devenin. Contact person: alfred.vernis@esade.edu; ESADE Business School, Barcelona, Spain.

JUST BECAUSE YOU WANT TO CHANGE THE WORLD, IT DOESN'T MEAN YOU HAVE TO START A NONPROFIT

Claudia Barrulas Yefremian, California State University Long Beach

Case Objectives and Use

This case can be used in general management courses, business strategy, small business, corporate governance, introduction to entrepreneurship, and nonprofit management. The case is most suitable for an undergraduate student audience. The case was written to (1) illustrate the organizational challenges of a nonprofit organization, (2) give students practice in analyzing and evaluating a nonprofit organization, (3) discuss the role of nonprofits in society, and (4) decide if the organization has what it takes to continue operating. The case requires that students apply the SWOT analysis and draw upon theory (resource-based view theory) and other management concepts, such as nonprofit management and governance and leadership succession, to prepare for class discussion. After studying this case, students will be able to:

- LO1 Conduct a SWOT analysis of SugarWatch.
- LO2 Analyze SugarWatch's challenges through the lens of the resource-based view theory.
- LO3 Evaluate the governance structure of SugarWatch and its implications for decision-making and leadership succession.
- LO4 Discuss the role of nonprofits in creating social change and how they can balance mission-driven goals with financial sustainability.

Case Synopsis

SugarWatch was a Long Beach, California-based nonprofit organization founded by Brent Walmsley, a middle-school English teacher, in 2015. The organization's mission was to engage the community at three primary levels. First, as a partner to schools to raise awareness of the dangers of sugar in children's diets. Second, as a partner to local produce vendors to establish a mobile farmer's market to supply the food deserts in Los Angeles County with fresh produce at affordable prices. Finally, as a social advocate to raise awareness for the benefits of a balanced diet and contribute to policy change. The idea to launch SugarWatch started when Walmsley began his own health transformation and committed to an ambitious 800-kcal/day diet to lose weight. Walmsley's passion for helping disadvantaged communities and SugarWatch's mission attracted many volunteers. However, SugarWatch's main challenge since day one was financial sustainability. The nonprofit had been able to raise funds, but it needed more to carry on its mission. By the end of 2018, Walmsley was increasingly disappointed about how challenging it was for SugarWatch to raise funds. He had tried to raise funds but with limited success. In December, Walmsley emailed the board stating he could no longer continue as SugarWatch's president. Walmsley and the board had to decide the nonprofit's future. Would SugarWatch have the fortitude to carry on? There were three potential alternatives: someone from the board could carry on the nonprofit's mission, the board could hire a new person, or SugarWatch could close its operations.

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EXPANSION OR CONSOLIDATION: THE CASE OF THE BOYS AND GIRLS CLUB OF TIJUANA, BAJA CALIFORNIA, MEXICO

Manuel Ruíz Páez (student author), Universidad Autónoma de Baja California
Gabriela Ruíz Páez (student author), Universidad Autónoma de Baja California
Roberto Iván Fuentes Contreras (faculty supervisor), Universidad Autónoma de Baja California

Case Objectives and Use

The present case study, being a situation where two fronts within the same civil organization seek to carry out a decision that can completely influence the direction of the next step in the development of the institution is intended to be used at an undergraduate and graduate level, as well as in training courses and certificates in administration, negotiation and strategic planning, in relation to the topic it deals with, which proposes different alternatives to a problem, and also requires that individuals are able to reach points of agreement to determine what resolution will be made and how it will be carried out. The particular objectives correspond to 1) evaluation of the social impact of a project by analyzing how much population it will serve and the benefits that each of the proposals may have. 2) Negotiation with the purpose of carrying out a strategic planning around problems faced by society. 3) Reflect on the importance of developing projects in areas that are marginalized, as well as focused on the population of children and adolescents.

Case Synopsis

This case study corresponds to recent events who happened in 2024, which have not been concluded, however, are in constant evaluation. It analyzes the situation faced by the civil association Club de Niños y Niñas de Tijuana, which is in a discussion regarding what should be the next step to take in order to expand its service coverage. On the one hand, there is the need to recover accessibility to its facilities for the general population after the loss of a public transportation route. On the other hand, there is the intention of generating a second plant in the municipality of Tijuana to serve more people in marginalized areas. Both positions arise from the need to provide a greater amount of service to the target population of the civil association, which is children and adolescents between 5 and 16 years of age. In addition, there is a shared vision within both ideas to serve the population residing in the eastern zone of the municipality of Tijuana, which corresponds to housing areas with higher levels of marginalization, as well as greater absence of urban equipment elements, such as parks, public space and other recreational elements.

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ACS CLOTHING: ENABLING FASHION BRANDS AND RETAILERS TO JOIN THE CIRCULAR ECONOMY

Marie-Cécile Cervellon, Edhec Business School
Lindsey Drylie Carey, Glasgow Caledonian University
Aileen Stewart, Glasgow Caledonian University

Case Objectives and Use

The case ACS Clothing is ideal for use in strategic marketing or sustainable marketing courses at the upper-year undergraduate or graduate level, including MBA or master's programs. It requires students to engage in strategic analysis, focusing on market trends, customer segmentation, company capabilities, and value creation. The case explores sustainable business practices and circular economy principles, providing a real-world application of these concepts. The objectives are to analyze the value creation logic of a circular business model, assess market potential across B2C and B2B2C segments, and identify growth opportunities that align with changing market trends and the company's capabilities.

Case Synopsis

In July 2023, Andrew Rough, CEO of ACS Clothing, reflected on the company's growth in the UK as a leading circular fashion hub. Strategically located in Scotland, ACS helped brands shift from a linear model to a circular one by cleaning, repairing and returning pre-loved and rental clothing. The business included both B2C (Business to Consumer) and B2B (Business to Business) operations. B2C focused on direct-to-consumer offerings, such as formal wear rental under the Cameron Ross Formal Wear brand, which had faced a slight decline due to changing trends. However, demand for fashion rentals and resale was rising, presenting growth opportunities. B2B services involved handling reverse logistics for fashion retailers for renewal, return and resale.

Andrew was considering several growth strategies for ACS. One option was to enhance their B2C business by entering new segments or repositioning the Cameron Ross brand to align with changing consumer trends. Another option was to broaden its B2B reach by tapping into additional market segments, particularly in the rental and reuse model. International expansion was also a possibility, allowing ACS to reduce its reliance on the UK market and target global fashion brands, although a previous attempt to enter the US market had been unsuccessful. A £10m investment from Circularity Capital in 2022 provided resources to explore these growth avenues, and Andrew planned to build a marketing team to define a clear strategy that aligned with the company's sustainability-driven mission.

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SUSTAINABILITY DECISIONS FOR A UNIVERSITY-OWNED WINERY: CAL POLY SAN LUIS OBISPO

Maria Ballesteros-Sola, California State University Channel Islands
Inhaeng Jung, Sonoma State University
Terry Lease, Cal Poly San Luis Obispo
Armand Gilinsky, Sonoma State University

Case Objectives and Use

The case is intended primarily for upper-division undergraduate courses in Wine Business & Marketing and Social Entrepreneurship or Social Innovation related courses. There is no expectation of previous knowledge in the wine industry. The case was written using both primary and secondary sources, is based on a real campus, and the real names of people involved in the winery were used. The case allows students to analyse a unique context as this campus-based winery has to balance its primary mission to educate students while being financially responsible.

1. *Describe* a campus winery value chain, including the concept of vertical and horizontal integration.
2. *Identify* institutional logics at play in a campus-based winery understood as a social enterprise.
3. *Evaluate* the pros and cons of alternative growth strategies for campus-based winery, using
4. *Recommend* a well-defended turnaround plan for this social enterprise that fulfills its primary goal.

Case Synopsis

Dr. Benoit Lecat, the head of the Wine and Viticulture Department at Cal Poly San Luis Obispo (CA), is preparing the year-end report for the 2023-2024 academic year. Despite the program's strong position—marked by growing enrollment, successful graduate placements, and robust fundraising—the operations at Cal Poly-owned Trestle Vineyard continued to incur losses due to high management costs and low sales prices for bulk grapes. Lecat must devise a turnaround plan to make the vineyard profitable while fulfilling the university's primary goal. The winery's business includes a wine club, e-commerce, and local B2B sales, generating around \$300,000 annually. Regulatory challenges, climate change, and societal shifts, such as changing consumer preferences and competition from other alcoholic beverages, further complicate operations and expansion efforts. Lecat contemplates several strategies, including new product development and enhancing sales and marketing efforts. The case explores the intricate balance of educational objectives, fiscal responsibility, and industry realities within the unique context of a university-owned winery considered a social enterprise.

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GROWING A MAYAN SOCIAL VENTURE IN GUATEMALA: RESTAURANTES CHICHOY

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

Case Objectives and Use

The case can be used in a graduate or undergraduate class on strategic management in a unit that is focusing on social and sustainable venturing. It is also appropriate for a section of a class that is focusing on social entrepreneurship, sustainable tourism or doing business in emerging economies. After analyzing the case, students will be able to analyze how managing a social venture is different than managing a financially focused venture. They will also be able to analyze the relationship between diversification, core competency and firm performance. Students will make strategic recommendations that are congruent with the venture's social mission, vision, and values and its sources of competitive advantage.

Case Synopsis

Restaurantes Chichoy is a well-known restaurant offering typical Guatemalan food in Tecpan, Chimaltenango, Guatemala. These restaurants have been known for their regional foods; chicken soup, chorizo, specialized sausage, and unique fruit pies. In addition, the unique buildings are on a popular highway to Lake Atitlan, a major tourist attraction for Guatemalans as well as international travelers. The area surrounding Lake Atitlan is also known to be a place to experience typical Mayan communities and culture. The restaurants celebrated a 50-year anniversary of amazing growth from a small cafe that supported surviving seventy-two widows of the civil war from 1960-1996 to become two thriving restaurants. Like many businesses tied to service and tourism, Restaurant Chichoy had to pivot quickly during the 2022 Covid pandemic to rethink their business model. They successfully navigated this crisis through expanding into related services. As of fall 2023, Grupo Chichoy was a thriving business: it continued to operate the two restaurants, with meeting rooms, service areas outdoors and indoors, children playground, a large parking lot, take-out, delivery and catering services, even to Guatemala City (1.5 hours away).

The case is set in September 2023. Doña Amalia was contemplating the next strategic steps for the restaurants. Her growing family was dependent on the opportunities the restaurants provided. The family is scheduled to meet to consider having different members responsible for expanding different aspects of their operations. Each family member would then be able to keep the profit generated by these separate operations. These options included expanding: the breakfast drive through, delivery service, starting a food truck, outdoor kiosks, expanding the hotel service, packaging sausages, sauces and canned fruits for sale in the store and other places, creating arts and crafts for sale, putting on special events that include the Sunday buffet brunch. Doña Amalia wanted the family to contemplate how they could separate aspects of the restaurants services that would provide the greatest opportunity for financial viability while still consistent with their social mission of supporting the local community and preserving Mayan traditions.

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KHAYELITSHA COOKIES: EMPOWERING WOMEN ONE BITE AT A TIME

Emmanuel Silva Quaye, Wits Business School
Angie Urban, Wits Business School

Case Objectives and Use

The case study may apply to entrepreneurship, ethical leadership, sustainability marketing, product innovation, UN sustainable development goals, and the manufacturing industry. The case study seeks to improve students' decision-making skills, particularly when deciding between making a social impact that may be costly versus building a profitable enterprise from the outset. The case material provides relevant information that should inform discussion in the classroom and help students make sound business decisions while contemplating how to lead with purpose by focusing on making a social impact while building sustainable and profitable businesses. The case is designed to be taught at a master's level, particularly in an MBA class, where doing business for social impact or leading with purpose is taught. The core theme for the module can be marketing for a better world where social marketing and social entrepreneurship take centre stage. Individuals involved in social enterprise development would find this case study and the teaching notes particularly beneficial.

Case Synopsis

This case situates Adri Williams, the managing Director of Khayelitsha Cookies (KC), a social enterprise based in the poverty-stricken township of Khayelitsha outside Cape Town in South Africa, in February 2024, considering if she has made significant enough strides in empowering the women in her employment in the Khayelitsha neighbourhood and its surroundings. The company faced the dilemma of focusing on people over profits. Although automating the production systems of KC would improve profit margins and enhance efficiencies in how the women worked, Williams had kept KC hand-baked, employing more than 90 women who each supported between three and five dependents. Since day one, Williams had decided to lead with purpose so that the well-being of several marginalised women became her life's commitment. Customer feedback indicated that the cookies he had hand-baked delivered a personal touch and sense of innovativeness. However, the hand-baked process output was minimal compared to automated systems. By 2024, the company had returned to good financial health. This achievement has allowed the company to look into the future with hope and excitement. Yet, with pressure mounting from new retail partners to replace its hand-baking method for automation for their orders, Williams wanted to explore automation in hopes that it would improve profits to fund incentives for the women and improve the working conditions on the store floor. Would Williams deviate from her long-held belief of favouring purposeful impact over profit? Had she changed her ethos, the company would have made profits and become more sustainable long ago. Why now, and would this be a good decision? Is it possible that with the implementation of effective marketing strategy and tactics, the company may achieve both ends – profits and social impact?

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FEMALE ACADEMIC LEADERS FELLOWSHIP: ENGENDERING INCLUSITIVITY IN THE ACADEMIC HIERARCHY

Keratiloe Sishoma Mogotsi, University of the Witwatersrand, Chatham University
Lucy Khofi, University of Witwatersrand, University of Amsterdam
Angie Urban, University of the Witwatersrand
Claire Beswick, University of the Witwatersrand

Case Objectives and Use

The purpose of this case is to broaden student's understanding on the sustainable development goals 5 and 10 and establish the practicalities of pursuing these goals using the social innovation of FALF. It is vital for students to learn the importance of context in pursuing development goals as gender and race inequality may present different situations in various parts of the world. Understanding context and the practicality of social innovation will help students to grapple with methods and strategies to effectively achieve social changes. The case is suitable for postgraduate students focusing on issues of social equity, development and transformation. The case also helps students to develop skills in evaluating impact and efficacy of social innovation. The case learning outcomes are as follows:

1. To evaluate and apply the gender and race sustainable development goals progress in an academic sector
2. To describe the applicability of social innovation in addressing key societal and environmental issues.
3. To rate the impact of the imitations of social innovation in creating social change
4. To develop a case for support to mobilize resources for the imitation of social innovations

Case Synopsis

At the beginning of September 2023, Dr Judy Dlamini, the founder and chair of the Female Academic Leaders Fellowship (FALF) and chancellor of the University of the Witwatersrand (Wits) in Johannesburg, South Africa, was reading through a report on the impact of FALF at Wits, where FALF's work had started. Formed in 2020, FALF was an independent non-profit company that aimed specifically to empower South African black and coloured¹ women to progress into academic leadership. She was encouraged by what she was reading, but not satisfied to let it rest there. "What are the key factors of FALF's success?" she asked herself. "And what will it take to scale the programme nationally?" She also wanted to understand what institutional hygiene factors should be addressed to ensure that all social groups felt that they belonged at universities across the country. "Transformation requires more than just money, it starts with a true commitment to gender and racial equity at the highest level of leadership," she said to herself. "How can FALF, working with all stakeholders, scale nationally and help to achieve that?". The United Nations sustainable development goals (SDGs) framework, particularly, goal 5 for gender quality and goal 10 for reduced inequalities are highlighted in the case as the reason for the development of the FALF social innovation. FALF's objective was to help promote African and Coloured women into academic leadership positions. The main barrier to taking leadership roles in institutions of higher learning is highlighted to be the attainment of full professorship. The case showed that support needed to be provided to African and Coloured women to achieve transformation in the academic sector. This case teaching note is anchored in sociological theory to assess how and if the social innovation of FALF has achieved any impact and help the protagonist to ascertain how future imitations of the innovation could be enhanced. The teaching note drives use of the case to establish the impact of the social innovation of FALF and the contributions to social change and targets of achieving transformation in academia.

¹ The South Africa racial classification Coloured refers to people of mixed race ancestry

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Hi TECH SURFACTANTS, INDIA – SUSTAINABILITY (ZED) CERTIFICATION DILEMMA: GO FOR GOLD?

Ravi Sharma, Conestoga College Institute of Technology and Advanced Learning
Rajul Singh, Conestoga College Institute of Technology and Advanced Learning
Jane Gravill, Conestoga College Institute of Technology and Advanced Learning

Case Objectives and Use

The Principles for Responsible Management Education (PRME) indicate ‘future business leaders should be trained to balance economic, environmental, and social goals’. This case is intended for undergraduate students in Business Management courses related to Sustainability, Sustainable Supply Chains, Sustainable Operations or International Application of Sustainability. The case highlights sustainability initiatives and policies adopted by global giant - Unilever, and their supply chain partner in India. It also showcases the Zero defect and Zero Effect (ZED) policy and standards being implemented in India and responsible leadership aimed to achieve the United Nations Sustainable Development Goals (SDG’s).

Case Synopsis

On January 9, 2024, Harsh Bhardwaj, Managing Director of Hi-Tech Surfactants (HTS), India, received an email from the HTS Secretary regarding the need to decide whether to implement processes to become compliant with the Government of India’s Sustainable Zero Defect Zero Effect (ZED) policy and embark upon the process of Sustainable (ZED) Certification. The Secretary recommended Bhardwaj consider investing in efforts to achieve the Sustainable ZED certification from the Government of India, Ministry of Micro, Small and Medium Enterprises (MSME). HTS was an outsource manufacturing partner of Hindustan Unilever Limited (HUL). Stringent quality and sustainability systems and procedures laid out by HUL were already in place at HTS and were being audited by HUL-appointed independent auditors. Sustainable (ZED) certification would call for HTS to follow an even broader range of documentation and procedures that would require hiring an outside expert consultant.

This would be an additional cost to be budgeted and would increase the workload on the HTS team.

The MSME entrusted the Quality Council of India (QCI), an autonomous non-profit body, to promote the ZED policy and implement models and standards for Sustainable (ZED) Certification. Sustainable (ZED) certification offered several benefits including recognition as a credible, responsible enterprise, increased environmental and social benefits, streamlined operations at lower costs and superior quality. Government also offered financial incentives – subsidy on certification costs, financial support for testing / systems, support for consultancy required, and subsidy on technology upgrades. The registration deadline for this year’s ZED certification application was March 31, 2024. The Sustainable (ZED) Certificates were granted at three levels – Bronze, Silver, and Gold – with more comprehensive, detailed, and demanding procedures and systems expected at each higher level. Increased financial incentives were available for higher level of certifications.

Bhardwaj needed to decide if the project to achieve ZED Certification should be launched. He had to further decide if the company should aim for bronze, silver or gold level of certification. As the deadline for the ZED Certification registration was March 31, 2024, and this date was also the HTS financial year-end, the decision was urgent given the ZED Certification project had financial impact for the next year’s budget.

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THE CHALLENGE OF CORPORATE PURPOSE AT PACÍFICO SEGUROS 2024

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Guillermo Quiroga, Universidad de Piura. PAD Escuela de Dirección
Lucero Sanchez, Universidad de Piura. PAD Escuela de Dirección

Case Objectives and Use

This case can be used in an MBA program or an Executive Education program. In both cases, we recommend using the case as a tool to reflect on and delve deeper into the concepts and fundamentals of corporate purpose. The theoretical framework proposed for the session will ensure that all participants - whether they have managerial experience or not - discover the organizational and anthropological foundations that underscore the importance of the formulation and implementation of corporate purpose for an organization.

The case is useful for understanding the importance of an organizational purpose, as well as its formulation and implementation in companies. It can also serve as an introductory tool for topics such as sustainability, strategy, and managerial decision-making through the analysis and evaluation of the internal and external situation of the organization.

Case Synopsis

In early 2024, César Rivera, General Manager of Pacífico Seguros, reflected on the process of implementing the corporate purpose and wondered how he should address the challenge of reaching a larger Peruvian population. The 2023 Financial Inclusion Index report for Latin America showed Peru near the bottom. Three years had passed since the formulation and introduction of the corporate purpose, and during that time, the company had undergone a series of changes resulting from the cultural transformation that began in 2019 with the introduction of the corporate purpose and the 2020 pandemic.

The implementation of the purpose at Pacífico Seguros began in August 2019 with the aim of transforming the company's mission, vision, and values to start working with a purpose-driven approach. This entailed a cultural transformation of the insurer that coincided with the uncertainty and complexities brought by the 2020 pandemic. Despite these complications, Pacífico remained true to its purpose of "protecting people's happiness," adjusting its business and support operations towards a more digital environment that would enable it to respond agilely to the needs of its customers and employees. Although the financial losses in 2021 were significant, the economic results of 2022 and 2023 reflected a recovery and a different way of working.

In February 2024, César wondered if he should reconsider the corporate purpose to address the new challenges facing the sector. The significant gap in the country's financial inclusion highlighted the existence of an underserved market. If the company's mission is to protect the happiness of the Peruvian population, the reality showed that they were only reaching a small group of people. The industry was in a "fishbowl," while the sea of opportunities remained unaddressed outside. But to expand their reach, was the company truly prepared? Would a change in mindset be necessary? How should they face this challenge?

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IPASA: ADDRESSING RISK AVERSION IN FUNDING CLIMATE PHILANTHROPY

Keratiloe Sishoma Mogotsi, University of the Witwatersrand, Chatham University
Stephanie Townsend, University of the Witwatersrand
Claire Beswick (faculty supervisor), University of the Witwatersrand

Case Objectives and Use

The purpose of this case is to help students to view climate action from a philanthropy perspective and understand the philanthropists' risk aversion and desire for impact to ensure that their resources are effectively utilized. The case helps students to enter the mindset of the funder and establish some of the causes of risk aversion. This is of paramount importance as some of the most groundbreaking solutions for climate change may involve risk – but they could yield high rewards in mitigating climate change impacts. The case is ideal for postgraduate level Masters students studying Sustainability, Non-profit management, fundraising and resource mobilisation as well as Climate and development focused modules. It is not suitable for undergraduate students as there is an assumption of a development of summative foundations in the fields of philanthropy, management, or sustainability. Through the case, students gain perspectives in fundraising and resource mobilisation whilst managing risk aversion in social investment. The case study is also suitable for short courses offered to middle and senior managers and executives as part of an executive education offering.

Case Synopsis

It was December 2023 and Louise Driver, executive director of the Independent Philanthropy Association of South Africa (IPASA), a membership-based organisation of independent philanthropic funders, was preparing for the organisation's 2024 strategic planning workshop. She was concerned about the slow progress of IPASA's three-year initiative to encourage its members to adopt a climate lens in their funding strategies and progress members along their climate response journeys. Initially, funders appeared unable to see that climate change was already exacerbating the very problems they were trying to address. Gradually, IPASA's initiatives had raised funders awareness of the urgency of the climate crisis, that it intersected with their work, and that they had to respond to address its impact. As she reviewed what the organisation had been doing in this area, and how its approach had evolved, she wondered if it needed to find new ways to encourage funders to support climate philanthropy.

Goal 13 of the 17 United Nations Sustainable Development goals zones in on climate action which is imperative to tackle the complex issues associated with climate change. Climate action consists of an ecosystem and mitigation activities to combat climate change such as developing solutions that reduce carbon emissions, implementing clean energy and strengthening adaptive capacity to climate induced impacts. To achieve climate action, social innovation is required but there is a delicate balance between risk aversion and the need for innovation and experimentation in tackling climate change.

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SUSTAINABILITY CHALLENGES AT BHOOMIKA VIHAR: ENABLING WOMEN'S EMPOWERMENT THROUGH TACKLING GENDER ISSUES AND TRAFFICKING

Mamta Singh, CIMP
Vijaya Zinnoury, University of Denver
Arayana Roy (student author), CIMP

Case Objectives and Use

This case is written for use in graduate and undergraduate business courses in:

- Women's Leadership
- Non-profit management

It can also be used in the Sustainability and Social Impact modules taught in:

- NGOs/ Non-profit organizations in Emerging Markets.

Topics Covered: Non-profit organizations; Financial Sustainability; Women's Leadership; Social impact; Gender equality; and Women's empowerment.

Case Synopsis

Ms. Shilpi Singh, Director of Bhoomika Vihar (BV), a non-profit organization worked tirelessly to uplift the underprivileged, by particularly addressing gender-based violence and fostering women's empowerment. Transforming societal norms was at the core of the mission and goals of the organization founded by Shilpi's late father, Arun Singh, in the State of Bihar, India. The case discusses leadership transition at the non-profit organization as Shilpi took over BV's leadership (upon the demise of her beloved father) and the social impact BV continued to have through the programs offered to marginalized communities in Bihar.

As a grassroots organization run by volunteers, BV experienced declining resources. The critical challenge Shilpi faced in 2023 was how to make BV financially sustainable and continue her efforts to achieve women's equality and empowerment of the marginalized and pave the way for long-lasting societal transformation. Students have the opportunity to make recommendations to Ms. Singh about how to make BV financially sustainable.

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ALL IS WELL, YET WHY ARE PEOPLE LEAVING THE NGO? CAN DESIGN THINKING HELP JATAN SANSTHAN?

Bindu Kulkarni, S.P. Jain Institute of Management & Research
Renuka Kamath, S.P. Jain Institute of Management & Research

Case Objectives and Use

This case is designed for graduate and postgraduate students in the social/ development sector and social entrepreneurship programs. It can be used in design thinking, social enterprise operations, and social innovation courses. It can also be used in executive management programs to sensitize students to the unstructured nature of the social sector and the adaptable nature of the design thinking process. The case is written to take the students through all stages of the design thinking process, from problem structuring to problem-solving. At the close of the case discussion, students will be equipped to arrive at insights, identify an opportunity area, ideate, and find feasible and impactful solutions for the social sector problems.

Case Synopsis

Dr. Brijwasi, and his colleagues had established Jatan Sansthan, a not-for-profit organization in the city of Udaipur, with a mission to work at the grassroots level with rural and resource-poor communities in Rajasthan, a state in the west of India. Their goal was to empower these communities, particularly the youth, to engage in policy formulation and advocacy. They were firm believers in the power of community participation and the potential of the youth to be catalysts for change. Dr. Brijwasi was happy he had built an organization that offered a family-like work environment where employees interacted cordially with each other. But in January of 2023, Dr. Brijwasi was a worried man. With the commitment to seeing employees grow and regularly conducting capability-building workshops, why was it so difficult to retain people? Why was attrition still an issue? What could be the problem? Dr. Brijwasi was concerned about retaining employees, building capacity, and making the employees believe in Jatan's mission of becoming change agents. He felt the problem was unstructured and human-centered, so he needed a new approach. The design thinking approach he had heard of was likely the right way to decipher the issues his employees had stated in the interviews. Would it provide the way forward and yield results?

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Strategy and Policy Cases

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

Co-Chairs: Terry McGovern, University of Wisconsin - Parkside

Table 1

Session Chair: Leif Lundmark, University of Nebraska Omaha

Cases	Authors
APROFOR	Javier Silva Sebastian Guimaraens Sr. Marcos Soto Sr.
Market and Non-Market Strategies in a Highly Regulated Market	John Francis
Right at Home: Navigating the Silver Tsunami in Senior Care	Leif Lundmark Kaleb Heckens Erin Pleggenkuhle-Miles Erin Bass
Pampas: Riding the Esports Wave	Enrique Chamas
Nancy Whiteman and Wana Brands: Sell Out or Stay Independent?	Paul Seaborn
Making No Little Plans for the Florida Aquarium	Matthew Mullarkey Kimberly Gratz

Table 2

Session Chair: Terry McGovern, University of Wisconsin - Parkside

Cases

Zudio: In Battle for India's Fashion Market

Pfizer Inc. – Strategizing for an Encore

Can Budweiser Tend Both its Business Goals and Promote its Social Agenda?

Accounting on the Rocks with a Twist of Technology

Growing our Future Childcare Co-operative

Authors

Malay Krishna
Anuvrat Anand

Raymond Paquin

Christopher Cassidy

Leigh Moon

Daphne Rixon
Ashley Doyle
Stephen Maclean

APROFOR

Sebastian Guimaraens, UCU Business School
Javier J. O. Silva (faculty supervisor), UCU Business School, UdeSA - Business School
Marcos Soto, UCU Business School

Case Objectives and Use

This case has been developed for use in MBA programs, particularly as an introduction to strategic management. It can also be used in executive programs to discuss issues of corporate and competitive strategy. Additionally, it can be useful in family business management programs, with a focus on emerging markets and specifically in decision making sessions.

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

1. Understand the societal impact of business models in companies from emerging markets.
2. Identify strategic issues and how to address their root causes, with an emphasis on external factors such as the economic context, key account behavior, and the company's societal role.
3. Evaluate strategic alternatives and their impact on key stakeholders, using both qualitative and quantitative analyses.
4. Make decisions in uncertain environments and learn how to turn difficult situations into opportunities for growth.

Case Synopsis

At the beginning of 2019, APROFOR, a company dedicated to providing forestry services, livestock farming, and logistics services, faced a complex economic situation that required strategic decisions. Its two main clients reduced their contracting of wood supply services indefinitely due to the drop in international pulp prices and an overstock of raw materials. As a result, the company had to deal with a sudden one-third drop in revenue while maintaining the payment of operational structure and significant investments it had just made in buildings and facilities.

Its founder and director, Robert Candia, had to decide, considering the viewpoints and opinions of his main stakeholders, which would be the best course of action to overcome the difficult situation. The options were to divest assets in the forestry business, exit the integrated cargo transportation business, or restructure the diversified livestock business. Any of the three alternatives would impact the strategic definition and business model, with economic-financial, social, and reputational consequences. What decision should Robert make? Should his strategic vision, the technical criteria of his advisors, or the interests of his family prevail? What would be the impact on the various stakeholders?

This case exposes the reader to the challenges faced by a first-generation Uruguayan family business operating in a high-growth sector and the various impacts that its strategic decisions could have on the stakeholders involved in the two businesses with the greatest impact on the country's GDP: livestock and forestry.

The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case, instructor's manual, and synopsis were anonymously peer reviewed and accepted by the North American Case Research Association (NACRA) for its annual meeting, NACRA 2024, Orlando, Florida, U.S. October 16-18, 2024. All rights are reserved to the authors and NACRA. © 2024 by Sebastian Guimaraens supervised by Javier J.O. Silva & Marcos Soto. Contact person: Javier Silva, UCU Business School - Uruguay, javier.silva@ucu.edu.uy.

MARKET AND NON-MARKET STRATEGIES IN A HIGHLY REGULATED MARKET: THE FUTURE OF TRICAL IN CALIFORNIA

John Francis, San Diego State University

Case Objectives and Use

This case is intended for teaching strategy at the senior undergraduate or MBA levels. The case should be analyzed/discussed in the semester in conjunction with course content that relates to the opportunities and challenges of trends in the general environment, particularly challenges related to political and regulatory changes, and business sustainability. The case focuses on a business in the Agriculture Science segment and can be utilized to highlight and discuss business models and competitive advantage. Given the diversified nature of business, the case can also be used to discuss opportunities for diversification or expansion into new products and geographic areas. The case may also be used in ethics or business environment electives which focus on sustainability challenges. Elaboration on these topics would enable to develop greater understanding on how non-market environments (i.e., political, regulatory) influence strategy.

Case Synopsis

The California Department of Pesticide Regulation (CDPR) has unveiled a 30-year plan to phase out high-risk pesticides, focusing on health and environmental protection, especially in vulnerable communities. This regulatory tightening poses strategic challenges for TriCal CEO Dean Storkan, who must decide whether to educate stakeholders, diversify markets, or adapt business practices to align with sustainable pest management goals. TriCal, founded in 1961, specializes in innovative soil fumigation for high-value crops in California, treating approximately 53,000 acres of farmland in 2021 while prioritizing crop health and worker safety. Despite diversifying into other AgTech segments, TriCal remains focused on soil fumigation, navigating stringent federal and state regulations to maintain its leadership and trusted grower relationships. The TriCal group (TCG), including 27 domestic and international entities, has expanded into precision irrigation, crop nutrition, plant and soil testing, disease-resistant plant grafting, custom agricultural equipment, and bleach production, with the fumigant, chloropicrin as its most profitable product. Global agricultural productivity is under pressure, with 3 billion people unable to afford healthy diets and food demand projected to rise by 35% to 56% by 2050, highlighting the critical role of California's \$59 billion agriculture sector. Scientific advancements have boosted productivity despite fewer farms, with soil fumigation crucial for high-yield specialty crops like strawberries. The global demand for agricultural technologies, including precision agriculture, AI, and sustainable farming practices, is growing, though balancing productivity and sustainability remains challenging. Facing regulatory uncertainty from the CDPR's stringent Strategic Pest Management program, TriCal may need to accelerate diversification into other markets or crop solutions to offset potential revenue losses from heightened regulation.

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RIGHT AT HOME: NAVIGATING THE SILVER TSUNAMI IN SENIOR CARE

Erin G. Pleggenkuhle-Miles, University of Nebraska at Omaha
Leif Lundmark, University of Nebraska at Omaha
Kaleb Heckens, University of Nebraska at Omaha
A. Erin Bass, University of Nebraska at Omaha

Case Objectives and Use

The case provides students with the opportunity to practice both the art and science of strategy analysis. It is best suited for a class in strategic management at either the undergraduate or graduate levels and. One advantage of this case is the flexibility it provides in teaching strategic analysis and decision making. The balance of external and internal information allows the instructor to focus the discussion on whichever topics are being covered at that time (external industry considerations, internal analysis, positioning, etc.). Moreover, the multifaceted problems facing Right at Home provide a nice fit for instructors wishing to teach strategic problem formulation. Lastly, courses examining franchise models will find that the at home elderly care industry provides a rich context for discussion.

Case Synopsis

Allan Hager founded Right at Home to address a disturbing trend he had identified while working as a hospital administrator, the ineffective (or in some cases complete absence of) elderly care following hospital visits. Right at Home's mission, "to improve the quality of life for those that they serve" is reflected throughout the company from its business model and resource allocation decisions to its day-to-day operations. Rather than frame elderly care as a service to those with unique needs, Right at Home reconceptualizes elderly care as an opportunity to "...start talking about living!" This patient centered and optimistic vision is unique in the industry and has resulted in meaningful growth. Right at Home franchises are organized into 532 unique territories around the world with 284 franchise owners and over 17,000 caregivers.

While the outlook for at-home senior care industry is optimistic, Right at Home is facing some clear challenges. First, changing demographics have resulted in a silver tsunami, a dramatic increase in number of adults needing care. Importantly, however, there are not enough caregivers in the industry to meet demand. When combined with slowing population growth, this challenge is unlikely to go away. Second, franchisors in this industry are required to balance the demands of multiple stakeholders including: patients, adult children of the patients, franchise owners, caregivers, company employees, etc. The multiplicity of key stakeholders requires Right at Home to simultaneously communicate and provide "value" to each group. Lastly, the at-home elderly care industry is characterized by intense competition with many companies offering similar services. Powerful competitors are beginning to make strategic "bets" on technology or niche services, resulting in resources advantages and valuable alliances. Creatively is likely to play an important role in determining who emerges as the leader once the silver tsunami has passed. Ultimately, Right Home believes the combination of innovation, compassion, and dedication will be enough to position the company for success.

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PAMPAS: SURFING THE ESPORTS WAVE

Enrique Chamas, Austral University
Ethel Pis Diez, Austral University
Stefano Carlucci, Austral University

Case Objective and Use

This case is particularly useful for understanding the most relevant issues to consider in the development of ecosystem business models as mechanisms for growth and monetization. Additionally, it distinguishes these models from digital platforms and examines the challenges associated with their development. The study highlights the key factors that can influence the emergence of a new market, where all ecosystem players are essential, and addresses the challenges involved in developing a business ecosystem and digital transformation in an industry traditionally linked to the physical world. Secondly, it also addresses relevant issues for analyzing company mergers.

In summary, the most relevant teaching objectives are as follows:

- Analyze the growth drivers of the emerging eSports ecosystem and the key players involved. Position a company to take advantage of this growth.
- Understand the main issues that should be considered in a company merger.
- Understand the concept of a business ecosystem and how it differs from a digital platform and business model.
- Understand the challenges of building a business ecosystem, strategic alternatives, possible roles within an business ecosystem, and the risks associated with managing a multi-stakeholder strategy.

The case can be used in business strategy, business decision analysis, business growth and/or entrepreneurial strategy programs. It can be used in courses for business executives, MBAs, EMBA's and undergraduate programs in management or media and entertainment related careers. It would be useful for students to have some experience in strategic management courses, and the case would broaden their understanding of the field of strategy. However, the case also benefits students who have never encountered these topics but wish to understand the specific challenges strategists face in rapidly developing markets. Ideally, the case should be presented in the middle or towards the end of a course of strategy or digital transformation.

Case Synopsis

In December 2022, Pampas management faced the dilemma of accepting a merger offer from one of the most promising teams on the Argentine esports scene. Rejecting the offer could jeopardize the economic sustainability of the team, which relied almost exclusively on its sponsors as its only source of income. Accepting the offer would allow them to generate synergies and have more financial resources in the short term, but it would also mean losing the identity and brand they had built, potentially affecting the sense of belonging they had fostered with their audience and delaying the development of new businesses that could arise from the creation of an esports ecosystem in the region. Faced with this dilemma, managers contemplated the possibility of developing a business ecosystem by harnessing the value generated by participants in the esports ecosystem and the versatility and exponential potential of digital technologies. This approach would encompass a broader range of esports-related products and services. The central challenge lies in balancing the considerations necessary for a merger with the complexities involved in formulating a robust business ecosystem strategy.

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NANCY WHITEMAN AND WANA BRANDS: SELL OUT OR STAY INDEPENDENT?

Paul Seaborn, 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 strategic management, entrepreneurship, and entrepreneurial finance. The case focuses on a potential acquisition between two companies, one privately-owned and one publicly traded, in the nascent legal cannabis industry. The case highlights the key decisions that entrepreneurial founders face when they successfully grow their company to the stage where it is the subject of potential acquisition. Through this case, students can gain experience conducting external environmental analysis of an industry and market with analysis of a specific acquisition proposal. They also gain insight into the personal dilemmas faced by company founders when considering selling their company. Students have an opportunity to form an opinion on the acquisition proposal and use that opinion to develop appropriate negotiation strategies. The case also highlights the unique opportunities and challenges that exist in the nascent legal cannabis industry, some of which are also common to other emerging industries.

Case Synopsis

It is the Fall of 2021 and Nancy Whiteman, founder and CEO of cannabis edibles company Wana Brands, based in Boulder, Colorado. Whiteman is in discussions with a publicly-traded Canadian cannabis company, Canopy Growth, about selling her company. Wana was one of the earlier legal cannabis companies in the United States, formed soon after Colorado legalized medical cannabis and was one of the first two U.S. states to legalize adult-use cannabis. At the time of the case, cannabis was still illegal according to the U.S. federal government which significantly limited Wana's operations and opportunities for growth. In contrast, Canada had legalized cannabis nationally for both medical and adult-use which had allowed Canopy Growth to become publicly traded on a Canadian Stock Exchange and raise significant external funds. Like many entrepreneurs, Whiteman is torn as to whether to sell the company she founded and grew to another entity. Unlike most entrepreneurs, Whiteman's decision takes place in the unusual context of the cannabis industry, where the degree of uncertainty and legality of all aspects of the industry, including acquisitions such as the proposed Canopy-Wana deal, is not always clear and changes regularly.

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MAKING NO LITTLE PLANS FOR THE FLORIDA AQUARIUM

Kimberly Bruce Gratz (student author), University of South Florida
Matthew Mullarkey (faculty supervisor), University of South Florida

Case Objectives and Use

This case was designed for senior level undergraduate and master level business students in management, strategy, capital planning, hospitality and marketing disciplines with an emphasis on organizational and corporate strategy. It explores the complexities and tensions that exist for organizations in evolution and with multiple stakeholders and competing priorities, as well as the relationship dynamics between stakeholders and how those issues can affect strategic decisions. Also, the balance between social priorities and mission are weighed against requirements for revenue growth, profitability and organizational sustainability.

Students working on this case will dissect and analyze stakeholder priorities against organizational identity and goals to develop an understanding of the art and science involved in leadership and strategy.

Case Synopsis

This case features Roger Germann, CEO of The Florida Aquarium (“TFA”) as the protagonist. The Florida Aquarium is a nonprofit AZA accredited aquarium and conservation organization opened in 1995 to revitalize and stimulate development of Tampa’s urban waterfront. Originally considered as tourist attractions, aquariums have evolved into complex organizations with multiple missions including research, conservation, community engagement, education and entertainment. They are expensive to build and sustain and their financial viability depends on attracting more and different visitors, as well as garnering community and philanthropic support.

Set in Spring 2024, Roger German has been CEO for more than six years. Under his leadership, TFA has experienced tremendous success, having achieved record attendance, almost doubling the annual operating budget from \$21MM to \$41MM, strengthening the organizations balance sheet, while continuously investing in its infrastructure and people. TFA was also in the middle of a \$45MM capital campaign, the largest in its history. Given it takes years to execute growth strategies for Aquariums and they require the full support of stakeholders and partners, Roger needed to determine what the next big strategic step should be for TFA and make a recommendation to his board.

Options include organic revenue growth through ongoing investment in the aquarium attraction, investment in research and conservation campus, potential partnerships and alliances to focus on research and conservation, reorganization by combining resources or operations with similarly minded mission organizations. These options would need to be considered keeping the priorities of all stakeholders and resources in mind.

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ZUDIO: IN BATTLE FOR INDIA'S VALUE FASHION MARKET

Anuvrat Anand (student author), SPJIMR
Malay Krishna (faculty supervisor), SPJIMR

Case Objectives and Use

This case was designed for use in a masters-level, elective course in competitive strategy. Within such a course, the case can be positioned in a module related to judo strategy, usually towards the beginning of the elective course. After working through the case and assignment questions, the students should be able to:

- Trace the elements of judo strategy in a company's positioning.
- Identify the competitive threats and challenges facing a business.
- Analyze and prioritize options to respond to competition, using concepts from judo strategy and sumo strategy.

Case Synopsis

This case outlines the success and challenges of competing in India's \$100 billion market for retail apparel in August 2023. Against the backdrop of a mature competitor set, Zudio had emerged as a fast-growing winner with an unusual positioning. Marjolein Brandwijk, the head of Zudio since 2017, had encouraged a number of innovations: Zudio was rare amongst its peers not only for its growth rate (15-20 new stores opened every month), but also how it got there: no advertising, a concentration in small towns usually eschewed by big rivals, and no e-commerce. But now Brandwijk needed to consider how to respond to imitation from Reliance Industries, the \$100 billion backer of Yousta, which aimed to grow 200 stores in 6 months, targeting a similar demographic with a similar offering. Brandwijk could simply ignore Yousta, and instead, double down on more Zudio store openings from the current 15-20 new stores per month. Other options included introducing a new line of products, and opening an online store.

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PFIZER INC. – STRATEGIZING FOR AN ENCORE

Raymond Paquin, Concordia University

Case Objectives and Use

This case provides students with an interesting challenge of analyzing and developing a growth strategy for a firm which is already one of the market leaders and which is following extraordinary, perhaps once in a generation, revenue growth. Students are expected to analyze the dynamics of the pharmaceutical industry and Pfizer's changing place within it as both the firm and the industry are facing changes. In particular, students will align Pfizer's key resources and capabilities with a path for continued success.

The case is intended for advanced undergraduate or graduate level strategy courses and can be used in a number of ways, for example (a) as an introductory case at the beginning of the course to introduce different facets of strategic analysis; (b) as a comprehensive case later in term where students synthesize various components of strategic analysis into a comprehensive recommendation; and (c) as an exam case with similar expectations as with point (b).

Case Synopsis

In mid-January 2022, Pfizer Chairman and CEO Dr. Albert Bourla and the Executive Leadership Team face a strategic dilemma. In 2019 and into 2020, Pfizer engaged in a strategic transformation, including divestments, to become more focused. In 2021, due to the success of its COVID vaccines and therapeutic products, the already multi-billion-dollar pharmaceutical company almost doubled revenues. In 2022, as COVID moves from novel pandemic issue to a routine endemic one, Bourla and his leadership team need a clear strategy for the future which they can discuss on their analyst conference call in early February and which can move the company forward.

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CAN BUDWEISER TEND BOTH ITS BUSINESS GOALS AND PROMOTE ITS SOCIAL AGENDA?

Christopher M. Cassidy, Sam Houston State University

Case Objectives and Use

This case asks students to analyze and discuss several highly controversial and divisive issues which, depending on your point of view, have ambiguous solutions. Some students are likely to have strong feelings about the various issues contained in the case and take one side or the other. The first goal of the case is to provide students with a topic where they can demonstrate their ability to objectively analyze the various controversial issues contained in the case. The second goal is to provide students with the opportunity to constructively engage with viewpoints with which they may disagree.

The case is intended for classes that deal with multidisciplinary topics such as strategy, ethics, or corporate social responsibility.

Case Synopsis

In 2023, Budweiser's Vice President of Marketing, Alyssa Heinerscheid, embarked on a social media marketing campaign involving Social Media influencer, Dylan Mulvaney. The campaign did not have the intended result. The result was consumer boycotts and billions of dollars in lost revenue. Anheuser-Busch InBev Sa, Budweiser's parent company, surrendered its dominant position in the brewing industry, as the largest Brewer in the world, to its rival, the Molson Coors Beverage Company.

This case asks students to determine the best course of action for Budweiser in the context of the controversy by analyzing the goals of the company and the issues that lead to the ill-fated social media campaign. Students should be able to recommend an optimal course of action going forward.

The author developed this 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 and presented at the Annual Meetings of the North American Case Research Association (NACRA), Orlando, FL, 17-19 October 2024. This case was composed entirely by a human – No AIs were harmed in the creation of this case. © 2024 by Christopher M. Cassidy. Contact author: Christopher M Cassidy, Department of Management, Marketing, and Information Systems, Sam Houston State University. Phone: 936-294-1975; email: cassidy@shsu.edu.

ACCOUNTING ON THE ROCKS WITH A TWIST OF TECHNOLOGY

Leigh Moon, Illinois Wesleyan University

Case Objectives and Use

This case can be utilized in an undergraduate strategic management/business policy course as part of a unit covering SWOT (strengths, weaknesses, opportunities, threats) analysis. Previous experience with SWOT analysis is not required but may be preferred as this case utilizes a less traditional business unit – an academic department within a university. SWOT analyses can be completed for any type of organization. This case presents students with an organization they are familiar with as a customer but may not recognize or understand how individual academic departments function.

The learning objectives are as follows:

- Identify the internal and external factors impacting a business unit's strategy.
- Apply a SWOT analysis to a non-traditional business unit (an academic program).
- Recommend a business strategy (either from the options provided or from original development) based on the SWOT analysis.
- Explain how the SWOT analysis was utilized to identify the recommended strategy.

Case Synopsis

Timothy Jones was a professor and chair of the accounting program at a small liberal arts college in the Fall of 2023. The accounting program revised its curriculum to solve two problems: a decline in student enrollment and changes to the certified public accountant (CPA) exam. Implementation of the revised curriculum experienced a rocky start, and university-wide changes were underway that could impact implementation. Courses were revised and added to the program offerings to introduce new technology-focused topics, reduce content in less relevant areas, and grow interest in accounting in general. Through the new curriculum, students “chose their own adventure” and selected courses that met their career goals. The revised curriculum was initially labor intensive for faculty to develop and roll out, and resources were limited. One potential issue was too many course offerings and not enough faculty. Another potential issue was a lukewarm response to a new course that the accounting program had been sure would be an immediate success. Jones was unsure if the curriculum could move forward as originally envisioned. As planning for the next academic year approached, Jones needed to decide on how to move the accounting program forward. Should Jones and his colleagues push through and roll out the revised curriculum or should they step back, reassess and come up with a new strategy?

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 2024 Conference, Orlando, Florida, USA, October 17-19, 2024. © 2024 by Leigh Moon. Contact person: Leigh Moon, Illinois Wesleyan University, School of Business & Economics, State Farm Hall 306, 1312 Park St, Bloomington, IL 61701, 309-556-3184, lmoon@iwu.edu.

GROWING OUR FUTURE CHILDCARE CO-OPERATIVE

Doyle, Ashley, Acadia University
MacLean, Stephen, Acadia University
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Case Objectives and Use

The objective of this case is to introduce students to the importance of community engagement from both personal and business perspectives. Designed for undergraduate students in Introduction to Business, Management Strategy, and/or Community Development, this case offers students insights into real-world societal challenges, including national childcare and related workforce shortages. Upon completion of this case, it is believed that students will gain a greater appreciation for the need for community engagement as well as the importance of contributing to societal well-being at the personal level as well as at the organizational level. This case also offers students insight into the co-operative business model and how it can be utilized to address unmet social needs.

Case Synopsis

This case centers around Cory Munden, a nonfictional character who is currently the CEO of Atlantic Edge Credit Union in Newfoundland, Canada. The timeframe of the case is mid-2023. As a credit union, the organization that Mr. Munden oversees has an explicit mandate of community giving and in the case, Mr. Munden is wrestling with the alternatives available to him to fulfill this mandate. Approximately seven years prior, Mr. Munden's organization was the driving force behind establishing a childhood center in one of the rural communities in which his organization operated. However, since that time the credit union's geographic footprint has expanded significantly and now covers many additional rural areas that lack sufficient childcare services. Compounding the childcare situation in the province is the lack of early childhood educators across Canada. Additionally, Mr. Munden's experience developing the existing childcare center proved to be far more time-consuming than planned, and he is questioning if he has the personal resources and drive to undertake such a project again.

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 2024 Conference, Orlando, Florida, USA, October 17-19, 2024. © 2024 by Ashley Doyle, Stephen MacLean, and Daphne Rixon. Contact person: Ashley Doyle, Acadia University, 15 University Avenue, Wolfville, NS B4P 2R6, 902.585.1369, ashley.doyle@acadiau.ca.

New View Sessions

Presentation Titles

Tackling the Challenges of Creating and Publishing Cases with AI (Panel Discussion)

(Re)Energize your Courses in the Age of AI with Real-Time “Ripped-from-the-Headlines” Cases (Panel Discussion)

Leveraging a PRL Fellowship to Build a Career in Management Education and Research (Workshop)

From Ibero-America to the World: Building a Flourishing Case Writing Community (Panel Discussion)

Are Multi-media Cases an Effective Learning Tool or a Distraction? (Paper Presentation)

CRJ Editorial Team – The ‘First Last Mile’ for Submissions (Panel Discussion)

Panelists

Vijaya (Vi) Zinnoury, University of Denver (Moderator)
Theresa Coates, Limestone University (Moderator)
María Ballesteros-Sola, California State University Channel Islands
Vicky Lester, CEO, The Case Centre
Eric Dolansky, Brock University & Editor, CRJ
Jim Fisher, Saint Louis University
Marilyn L. Taylor, University of Missouri at Kansas City (emeritus)

Janis Gogan, Bentley University (emerita)
Francisco Jesus Lopez Lubian, IE Business School
Olga Kandinskaia, University of Limassol, Cyprus
Anna Czegledi, Conestoga College

Anjan Ghosh, Nazarbayev University

María Ballesteros-Sola, California State University Channel Islands (Moderator)
Maria Helena Jaén, Cladea Balas Case Consortium (CBCC)
Josep Lluís Cano Giner, Asociación Latinoamericana de Casos (ALAC)
Alfred Vernis, Social Enterprise Knowledge Network (SEKN)

David Wood, Ivey Business School

Eric Dolansky, Brock University
Randall Harris, Texas A&M University
Ram Subramanian, Stetson University
Meredith Woodwark, Wilfrid Laurier University

Open Access Teaching Case Journal (OATCJ) –
Why Publish Open Access Cases? (Panel
Discussion)

Jane Gravill, Conestoga College
Kevin McDermott, Conestoga College
Anna Czegledi, Conestoga College
Redwan Siddiqui, Conestoga College

Impact Through Case Teaching and Writing:
Creative Approaches and Recognition
(Presentation)

Vicky Lester, CEO, The Case Centre

A New Way of Developing & Teaching Cases:
Our Breakout Learning Experience (Panel
Discussion)

Michael Goldman, University of San Francisco
Maria Ballesteros - Sola, California State
University – Channel Islands

Unveiling the Naked Truth: Steering Through
the Blackhole of AI in Case Teaching
(Roundtable Workshop)

Vijaya (Vi) Zinnoury, University of Denver
Theresa Coates, Limestone University
Erica Berte, Metropolitan State University
J. Kay Keels, Coastal Carolina University
Marilyn L. Taylor, University of Missouri at
Kansas City (emeritus)
Tania Casado, Universidade de São Paulo

