

N A C R A



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CASE RESEARCH FOUNDATION

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

Chair of the CRF Board: Armand Gilinsky, *Sonoma State University* (emeritus)

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 11th year of the program's operation. The CRF has now awarded a total of 102 fellowships.

In 2025, the Case Research Foundation awarded fellowships to the following 10 individuals:

Fellow	Country	Institution
Alexia Lopes	USA	Syracuse University
Ana Maria Parente-Laverde	COLOMBIA	Universidad de Antioquia
Andy Sinclair	USA	Wilmington University
Arvind Shroff	INDIA	IIM Lucknow
Enayon Taiwo	CANADA	University of Winnipeg
Jami Perera	SRI LANKA	Uva Wellassa University of Sri Lanka
Juha Yoon	USA	University of Nevada, Las Vegas
Magalie Dubois	FRANCE	Burgundy Business School
Sandra DeGrassi	USA	Texas A&M - Corpus Christi
Siddharth Wadehra	INDIA	IIM Ranchi

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, McGraw-Hill Education, 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 2026 applications will be available in February 2026 via the CRF website.

JOHN SEEGER START-UP CASES WORKSHOP

Workshop Chairs

John Varlaro, Johnson & Wales University

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

Karen Boroff, Seton Hall University

Eric Dolansky, Brock University

Silvia Cacho Elizondo, IPADE Business School

James (Jim) Fisher, St. Louis University

Janis Gogan, Bentley University (emerita)

Michael Goldman, University of San Francisco

Olga Kandinskaia, University of Limassol

Rebecca Morris, Westfield State University

Margaret (Peggy) Naumes, University of New Hampshire (retired)

William (Bill) Naumes, University of New Hampshire (emeritus)

Melanie Reed, Thompson Rivers University

Jeff Shay, Babson College

W. Scott Sherman, Texas A&M University – Corpus Christi

Ram Subramanian, Stetson University

David Wood, Ivey Business School

Vijaya (Vi) Zinnoury, University of Denver

Cases	Authors
Air India: Turbulence Ahead?	Bhaskar Basu
An Unfinished Canvas: Unveiling a Community Arts Café with Brand Uncertainty	Ryan F. DeFronzo
Being in the DriverSeat – An exploration of Strategy of a Start-Up Franchise	Matt Bazely Alexander Miller
Does Andy Want to Take a Loan?	Sarah Holtzen
Global Game Plans: The NBA and NFL’s Strategic Playbook for Brazil	Alexia Lopes
Growth Through Diversification at Trivia Nation	Reginald J. Harris
Hellmann’s Canada: Spreading Growth in a Saturated Market	Ebrahim Mazaheri

Hynovation’s Investment Strategy: Choosing Between Domestic and International Markets

Vicky Nie

	Nick Chen Zhixing Wang Zijian Zhou
Immediate Jeopardy Promoting Patient Safety at CCMC	William C. Hawks
Innovation on the Sidelines: The Raiders' Sport Tech Dilemma	Juha Yoon
McKenna Logistics: Rethinking Space, Rethinking Strategy	Redwan Siddiqui Fatih Yegul
Meta's DMA Dilemma: Balancing Privacy, Profit, and Policy	Redwan Siddiqui Vik Singh Mehran Jamshidi
Navigating the Green Trade Barrier Maze: COSCO SHIPPING's Carbon Pricing and Low-Carbon Transformation Decisions	Hongtao Shen Honghui Lin Nan Chen
Plastic Bank: A For-Profit Circular Economy Social Venture	William R. Holmes
RLG Systems – Enabling Indian Businesses to Achieve their Sustainability Milestones	Sonia Mehrotra Uday Salunkhe
Scaling Smarts: Strategic HR Challenges in a Growing K–12 Staffing Agency	Craig Seal Thomas Norman Shammi Gandhi Christine Pereida Cinthya Vodanovich
Scaling Solar with Respect: Melina Laboucan-Massimo's Mission to Empower Indigenous Communities	Homeira Ekhtari
Sharing the Load: Strategic Decisions in Hospital Capacity Allocation	Enayon Sunday Taiwo
Shopping for Sovereignty: Walmart Canada Faces a Nationalist Backlash	Ana Parente- Laverde
Staying True to the Roots: Good Market Sri Lanka	Jami Perera
The Long Haul: Can the Mack Trucks Brand Withstand the Electromobility Age?	Pere Pascual Bejar Lisa L. Scribner
The Power of Pattern: Farm Rio's Model of Impact	Rebecca Wilson
Touchdown or Fumble? A Case of Player Selection in the National Football League	Sandra DeGrassi
When Vision Outpaces the Boardroom: Innovation Disrupted by Our Own Strategy	Kiran Kandade Asieh Tabaghdehi
Zoff's Strategy Recipe: Online Dominance or Omnichannel Play?	Arvind Shroff

KEYNOTE PRESENTATION

Re-Imagining the Case Method in the Age of Agility and AI.

In this address, Professor Euvin Naidoo shared how agile principles and AI tools can be applied in both case writing and in the classroom to reimagine the case method. He described tectonic shifts that influence business practices and professionals, and how business education must consequently respond to these changed dynamics. Cases studies were highlighted as a fast, flexible, and effective pedagogical approach for developing fundamental competencies in contemporary business.

Professor Euvin Naidoo is the Distinguished Professor of Practice in Global Accounting, Risk, and Agility at the Thunderbird School of Global Management, Arizona State University. In 2024, he received the prestigious global award for Outstanding Case Teaching from the UK's Case Centre. Prior to Thunderbird, he was a faculty member at Harvard Business School, teaching Financial Reporting, Risk, and Performance Management. With over two decades of leadership experience in banking, consulting, and venture capital across Johannesburg, New York, and San Francisco, he has led strategic initiatives in financial services, healthcare, and public sector transformation. He previously served as a Partner at BCG and held executive roles at Standard Bank and Barclays Africa. A Harvard Business School alumnus and a World Economic Forum Young Global Leader, his work focuses on agile leadership, risk management, and the future of work.

NEW VIEWS SESSIONS

Titles	Presenters
All Play and No Work? Using Improv in Case Teaching	Eric Dolansky
Bringing It Together: Critical Thinking, Debate, and Case Studies	William X. Wei Linda Zhou S. Bruce Thomson Zheni Wang Daisy Wang Gourong Zhu
Crafting Prompts – AI Engineering for Business Education: An Evolving Education Space	Vijaya Zinnoury Theresa Coates Kenton Epard Erica Berte Marilyn L. Taylor Tania Casado
CRJ Editorial Team: Are CRJ and I Right for Each Other?	Eric Dolansky Randall Harris Ram Subramaniam
How to Write Effective Cases Efficiently	David Wood
Reimagining African Business Case Formats	Claire Barnardo Sarah Boyd
Sharing Best Practices for Designing Online Learning with Cases	Randa Salamoun Olga Kandinskaia Antoine Duvauchelle Noah Askin
The Art and Science of Award-Winning Case Studies: A Master Framework for Excellence	Siddharth Wadehra
Unlocking the Potential of Case Writing Competitions: Best Practices and Recognition	Shimin Chen Candis McInnes Fran Baylis

PEDAGOGY & RESEARCH TRACK

Developing Case Scholarship in Teaching and Research

Track Chair: S. Bruce Thomson, *MacEwan University*

Papers	Authors
Gridlock at the Edge: A Modernization Dilemma	Isaac Benjamin
Modernization Vs. Mission: An HBCU's Singapore-Style Dilemma	Kristy N. Williams Cheryl Evans Jennifer Steele-Wilson
What is the Ugly Duckling of Strategy Models?	Theresa Coates Vijaya Zinnoury Marilyn Taylor

GRIDLOCK AT THE EDGE: A MODERNIZATION DILEMMA

Isaac J. Benjamin, University of South Florida

Case Objectives and Use

This case is designed for graduate-level courses in strategy, information systems, organizational change, IT governance, and infrastructure modernization within regulated industries. It is suitable for MBA, executive MBA, and DBA students. The case offers insights into how organizations manage large-scale digital transformations under financial constraints, cross-functional misalignment, and regulatory oversight. Students will explore trade-offs between modernization speed and stability, capital efficiency, internal bandwidth, vendor management, and long-term value creation. The case also fosters discussion around the human dynamics of innovation in legacy organizations.

Case Synopsis

Set in early 2025, this discussion case follows Chris, the Chief Information Officer of Tampa Electric Company (TECO), as he navigates a strategic dilemma involving the utility's \$265 million Advanced Distribution Infrastructure (ADI) program. Amid capital constraints, regulatory pressure, and escalating expectations for digital performance, Chris and his leadership team must determine how to sequence the deployment of smart grid technologies. TECO faces competing priorities: accelerated upgrades, workforce fatigue, cybersecurity risk, and shifting public utility expectations. The decision space spans five options: full-speed execution, phased rollout, a hybrid approach, system sustainment, or strategic partnerships. The case provides rich context around Florida's utility landscape, TECO's organizational culture, and technology architecture transformation. It challenges students to synthesize technical strategy, organizational behavior, and market dynamics within a regulated, high-stakes decision-making environment.

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 2025 Conference, Newport Beach, California, USA, October 16-18, 2025. © 2025 by Isaac J. Benjamin. Contact person: Isaac J. Benjamin, University of South Florida, Tampa, FL, email: BJI21@USF.EDU

MODERNIZATION VS. MISSION: AN HBCU'S SINGAPORE-STYLE DILEMMA

Kristy N. Williams, Jackson State University
 Cheryl Evans, Howard University
 Jennifer Steele-Wilson, Jackson State University

Case Objectives and Use

This case is designed for graduate and executive education courses in Strategic Management, Organizational Change & Leadership, Higher Education Administration, and Public Policy. It provides a complex, ethically nuanced decision scenario set in the under-explored context of a Historically Black University (HBCU), making it particularly relevant for discussions on equity, institutional identity, and adaptive strategy.

It provides a complex, real-world scenario for students to analyze a high-stakes leadership dilemma under significant constraints. The narrative forces a critical examination of how to balance competing priorities: innovation with tradition, external compliance with internal mission, and workforce demands with educational values.

Key Issues Addressed:

- Strategic Response to External Political and Fiscal Pressures
- Leading Organizational Change in a Mission-Driven Culture
- Stakeholder Management amid Competing Values
- Ethical Decision-Making: Quantifiable Outcomes vs. Mission Impact
- Adapting Global Models (Singapore SkillsFuture) to Local Contexts

Student Insights & Skills Developed:

Through preparation and discussion, students will enhance their ability to:

- Evaluate strategic trade-offs and make decisions under uncertainty.
- Apply Kotter's 8-Step Model to higher ed change.
- Analyze stakeholder power and coalition-building.
- Design metrics that track both performance and cultural health.
- Craft a persuasive, evidence-based recommendation.

Case Synopsis

From May 2024 to April 2025, Dr. James Martin, Dean of the College of Business at Southern Delta State University (SDSU), faces a critical decision. Under federal scrutiny and a six-month compliance deadline, he must determine the future of a workforce initiative inspired by Singapore's SkillsFuture model. The program has secured a \$2M partnership and strong employer support but has drawn faculty resistance over fears it undermines SDSU's historic mission of equity, access, and community impact.

Decision Point — Dr. Martin's must choose now:

- **Scale** quickly to secure funding and influence but risk burnout and mission drift.
- **Sustain** and iterate incrementally to build trust, but results may come slower.
- **Pause** entirely to strengthen faculty and infrastructure but risk losing funding and momentum.

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 2025 Conference, Newport Beach, California, USA, October 16-18, 2025. ©2025 by Kristy Williams, PhD, Cheryl Evans, EdD, and Jennifer Steele, MS. Contact person: Jennifer Steele-Wilson, Jackson State University, College of Business, 1400 J.R. Lynch Street, Jackson, MS, 39217, Jennifer.L.Steele@jsums.edu, 601.979.2686. Alternate: Kristy Williams, kristy.n.williams@jsums.edu, 601.596.6277.

WHAT IS THE UGLY DUCKLING OF STRATEGY MODELS?

Theresa Coates, Limestone University
Vijaya Zinnoury, University of Denver
Marilyn Taylor, University of Missouri Kansas City

Objectives

Quantitative paper exploring student's perceived understanding of strategy models from case based instruction in Strategic Management course. Analysis of ranked models to determine and understand which models are least understood in a course that uses the case methodology.

Theoretical or Practical Contributions

Analysis discovers that the BCG, Balanced Score Card and Financial Analysis models are perceived as the least understood while SWOT, PEST/EL, and 5 Force are more commonly understood by students. By understanding the rankings, instructors can better develop teaching pedagogy for these models.

The authors developed the article to propose future directions and evolution of case Pedagogy or Research. The article was anonymously peer reviewed for presentation at the NACRA 2025 Conference, Newport Beach, California, USA, October 16 - 18, 2025. © 2025 by Theresa Coates, Vijaya Zinnoury, and Marilyn Taylor Contact person: Theresa Coates Limestone University, 1116 College Way, Gaffney, SC, 5182076144, coatestheresa@yahoo.com

ACCOUNTING, FINANCE, AND ECONOMICS CASES

Track Chair: Charles Hilterbrand, *University of Mississippi*

Co-Chair: Anna Czegledi, *Conestoga College*

Co-Chair: Juan Pablo Dávila Velásquez, *INALDE Business School, University of La Sabana*

Cases	Authors
Brisagas: The Dilemma of Collection Payments Forecasting in the Colombian Caribbean Coast	Juan Pablo Davila Javier Tovar John Jairo Bocachica
Globeleq and Temane: Wrestling Project Delays and Stakeholder Management Towards Financial Close of the Mozambican Gas Power Project	Claire Barnardo Wikus Kruger Luvuyo Mncanca Sarah Boyd
Larsen and Toubro Limited – Managing Working Capital for Improved Returns	Sanjay Dhamija Shikha Bhatia Reena Nayyar
Mankind Pharma Limited’s Acquisition of BSV: A Masterstroke or a Risky Gamble?	Shikha Bhatia Reena Nayyar Sanjay Dhamija
Speak Up or Stay Silent: Ethics, Governance, and Accountability in Mattel’s Valuation Allowance	Mahendra Gujarathi Shankar Venkataraman

BRISAGAS: THE DILEMMA OF COLLECTION PAYMENTS FORECASTING IN THE COLOMBIAN CARIBBEAN COAST

Javier Tovar, INALDE Business School
Juan Pablo Dávila, INALDE Business School
John Jairo Bocachica, INALDE Business School (student author)

Case Objectives and Use

This case offers students the opportunity to use and apply a wide range of business analytics tools (from linear regressions to advanced predictive AI tools) within a complex business environment. The target audience for this case is: MBA students or Master's students in Business Analytics, Analytical Marketing, Corporate Finance (working capital management), or Operations programs. It is particularly useful for courses that integrate strategy and data analysis.

Case Synopsis

This case focuses on Isabella Montoya, Director of Billing and Collections at BrisaGas S.A. E.S.P., a public utility company in Colombia's Caribbean coast. The company faces the challenge of predicting which residential customers will pay their gas bills on time and which will not. The context is complex due to Colombia's socioeconomic stratification system (with high concentration in subsidized lower strata in the region, see Exhibit 2) and staggered billing cycles. Montoya intuits that a one-size-fits-all prediction approach is insufficient due to heterogeneity in payment behavior (Exhibit 1 shows examples). She must decide whether to implement a customer segmentation strategy prior to building predictive classification models (timely vs. late payment) and what analytical methodologies would be most appropriate, considering the high overall delinquency rate and by strata (Exhibit 3). The case requires students to analyze the situation, evaluate the interdependence between segmentation and prediction, and propose a data-based roadmap.

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 2025 Conference, Newport Beach, California, USA, October 16-18, 2025. © 2025 by Javier Tovar and Juan Pablo Dávila Velásquez. Contact person: Javier Tovar, INALDE BUSINESS SCHOOL, +5718614444, Javier.tovar@inalde.edu.co

GLOBELEQ AND TEMANE: WRESTLING PROJECT DELAYS AND STAKEHOLDER MANAGEMENT TOWARDS FINANCIAL CLOSE OF THE MOZAMBIKAN GAS POWER PROJECT

Dr. Wikus Kruger, University of Cape Town
Luvuyo Mncanca, University of Cape Town
Claire Barnardo, University of Cape Town
Sarah Boyd, University of Cape Town

Case Objectives and Use

This case is suitable to teach postgraduate and executive education courses that focus on project finance, contracts, risk mitigation for private power investment in Africa, and Doing Business in Africa courses. It explores the realities of project development, structuring, and funding in the African context. Ideal participants include: policy-makers, energy sector professionals, and investment bankers involved in African infrastructure.

The teaching objectives include to:

- **Understand project finance structures:** To appreciate the complexities of the financial and contractual structuring of a massive, complex infrastructure project in a very challenging financial context
- **Risk management:** To analyse the allocation of risks, including political, currency and project completion/project-on-project risks
- **Stakeholder coordination and conflict:** To analyse the stakeholder relationship management between various public and private parties to ensure long-term mutual interest (including the navigation of potential conflicts of interest)
- **Balancing public and private interests:** To investigate how to structure deals that are bankable yet meet long-term energy security and affordability goals

The main themes are project finance structure, risk allocation, and navigating multi-stakeholder interests.

Case Synopsis

This case looks at the Central Termica De Temane (Temane) gas-to-power plant development in Mozambique, Africa. The protagonist John Smelcer, managing director and business development head of Southern Africa for independent power producer Globeleq Africa Limited, is wrestling the issues with various stakeholders as he drives the project toward financial close in 2021. The project is one of the largest infrastructure projects in Mozambique's history and represents more than US\$652 million in investment, as part of a US\$2 billion value chain mobilisation programme. It is also one of the most complex, and innovative, independent power projects, involving a plethora of public and private sector actors in various roles. In the case, delegates will step into the shoes of one of the groups of stakeholders involved in the project in order to discover the reality of rolling out Temane on the ground.

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 2025 Conference, Newport Beach, California, USA, October 16-18, 2025. © 2025 by Claire Barnardo and Sarah Boyd. Contact person: Claire Barnardo, University of Cape Town, 9 Portswood Road, Green Point, 8002, Cape Town, South Africa, +27 82 852 0324 claire.barnardo@uct.ac.za.

**LARSEN AND TOUBRO LIMITED:
WORKING CAPITAL MANAGEMENT FOR IMPROVED RETURNS**

Sanjay Dhamija, Professor, IMI Delhi
Shikha Bhatia, Associate Professor, IMI Delhi
Reena Nayyar, Professor, IMI Delhi

Case Objectives and Use

The case is best suited for courses like Financial Management, Corporate Finance, and Working Capital Management at the MBA level and in executive education programs. The case is designed to help students understand and analyse the objective of working capital management and its key components viz. cash management, inventory management, receivables management and working capital financing. It gives an excellent opportunity for the students to understand and measure the operating cycle and cash conversion cycle. The case also highlights how firms adapt their working capital management during times of uncertainty. The students will also be able to appreciate the impact of efficient working capital management on the return on invested capital of a firm.

After analysing the case, the students shall be able:

- To quantify the operating cycle and cash conversion cycle of a firm.
- To analyse the key considerations in the management of cash, receivables and inventories.
- To explain the financing options for working capital
- To explain the changes in working capital management in the face of uncertainties
- To comprehend the impact of working capital management on the return on equity

Case synopsis

The case focuses on the working capital management challenges faced by Larsen and Toubro Limited (L&T), one of the largest engineering, procurement and construction (EPC) companies in India. As a part of its five-year strategic plan, Lakshay'26, L&T was targeting to improve its return on equity (RoE) to 18% by the financial year 2026 (FY26) as against the 10.5% it achieved in FY21. As current assets constituted over 72% of the total assets of L&T, it was imperative to examine the liquidity ratios, level of working capital, operating cycle, and cash conversion cycle of the company. The case provides students with an opportunity to analyse the working capital management strategies of a large, listed company. It would specifically allow students to evaluate how efficient working capital management was important for L&T to achieve its target Return on Equity.

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 2025 Conference, Newport Beach, California, USA, October 16-18, 2025. © 2025 by Sanjay Dhamija, Shikha Bhatia and Reena Nayyar. Contact person: Sanjay Dhamija, IMI Delhi, B 10, Qutab Institutional Area, New Delhi, Delhi 110016, 9811756347, sdhamija@imi.edu

MANKIND PHARMA LIMITED'S ACQUISITION OF BSV: A MASTERSTROKE OR A RISKY GAMBLE?

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Case Objectives and Use

This case is best suited for senior undergraduate- and graduate-level business school students in courses focusing on M&A, corporate restructuring, competitive strategy, strategic management, and investment banking.

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

- Examine the reasons for the shift in strategy from organic to inorganic growth.
- Identify possible synergies that drive mergers and acquisitions (M&A).
- Assess the fair value of the target company.
- Evaluate the risks associated with debt financing of an acquisition.
- Recommend the post-acquisition integration approach most suitable for the acquirer.

Case Synopsis

The case explores Mankind Pharma Limited's (MPL) strategic acquisition of BSV, a niche, value-focused, super-specialised biopharmaceutical player. MPL, traditionally a high-volume generics player, saw the deal as an opportunity to climb the value chain and diversify into premium therapeutic areas. The transaction, done in July 2024 at a valuation of INR 137.8 billion, marked a bold move by MPL to ascend the pharmaceutical value chain and diversify into high-margin, specialty segments. The acquisition offered clear strategic synergies for MPL, but the deal came at a steep price, raising concerns about whether MPL had overpaid. With the valuation significantly exceeding MPL's asset base, the transaction sparked debate over whether the move was a masterstroke or a risky gamble. Post-acquisition, MPL's leadership—particularly Managing Director Rajeev Juneja—faced a critical decision: how to integrate BSV in a way that would unlock its full strategic potential and justify the premium paid. The case challenges students to examine the valuation (paying too much) and value (value of possible synergies) conundrum. It provides an excellent opportunity for the students to examine different integration strategies with their associated benefits and challenges.

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SPEAK UP OR STAY SILENT: ETHICS, GOVERNANCE, AND ACCOUNTABILITY IN MATTEL'S VALUATION ALLOWANCE

Mahendra Gujarathi, Bentley University
Shankar Venkataraman, Bentley University

Case Objectives and Use

This case in accounting ethics helps students to (a) Analyze the implications and consequences of restating financial statements in real-world corporate settings, (b) Apply ethical theories such as utilitarianism and deontology for financial reporting decisions, (c) Analyze how individuals navigate ethical dilemmas and evaluate organizational approaches to supporting employees who raise concerns, (d) Critique the effectiveness of an organization's Code of Conduct and corporate governance mechanisms—including internal audit, external audit, and the Audit Committee—in responding to financial misconduct, and (e) Recommend strategies for rebuilding trust and strengthening ethical culture after a failure in governance and accountability.

The case is suitable for use in upper-level undergraduate and graduate courses in accounting, business ethics, and corporate governance. Prior knowledge of accounting standards is not required, as the technical content is explained in an accessible manner.

Case Synopsis

This case examines an ethical dilemma faced by Brett Whitaker, a mid-level accounting professional at Mattel Inc. Whitaker, Mattel's Director of Tax Reporting, discovered a \$109 million error that, if left uncorrected, would shift the loss from Q3 2017 to Q4 2017—making the Q3 loss appear smaller and the Q4 loss larger, even though the total annual loss would remain unchanged.

Acting on the suggestion of its external auditors, PwC, Mattel's senior management elected not to restate the company's previously issued financial statements nor disclose the deficiency in its internal control systems. Instead, they devised a creative maneuver – retroactive reclassification. Whitaker believed the maneuver was ethically and professionally inappropriate and continued to raise concerns. He received limited institutional support and developed a growing sense of isolation. Whitaker must decide whether to stay silent and wait for the right things to happen, escalate the issue to the Audit Committee or ethics hotline, blow a whistle to the SEC, or resign from Mattel.

The case raises several issues: Is it ethical not to restate quarterly financial statements simply because the full-year numbers are unaffected? It demonstrates how the formal systems at Mattel failed to prevent or correct the misstatement because the company's governance mechanisms existed only in form but not in substance. Whitaker challenged the prevailing decision, while his peers and supervisors accepted it and moved along. The case invites reflection on how organizations respond to principled dissent versus passive compliance. The case requires students to think what organizations can do to rebuild trust with internal and external constituents after governance failure incidents.

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CASES WRITTEN IN CHINESE LANGUAGE

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

Co-Chair: Shimin Chen, China Europe International Business School Case Centre

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

Cases	Authors
A Game of Strategy: Managing Offline Expansion and Online Innovation at CCYC	Lan Huang Vicky Nie
BK Ltd.: Opportunities and Challenges in Establishing a Joint Venture with UK Partners	Yi Ke Ruicong Sang
Dongguan Barreled Water: Multifamily Business Merger and Integration	Woo Kok Lian Wang Xin Yan Guo Zhao Dong
HW FM Service Outsourcing Contract Innovation (A)	Woo Kok Lian Wang Xin Yan
Qingshan Group: The Path to International Growth for Multinational Companies in Emerging Markets	Shimin Chen Ling Zhao
Sustainability For a Better Future: Goldwind Science & Technology's Path to Health Management	Yang Wang Yuan Wei
The Market Launch of Washable Masks	Jin Dai

A GAME OF STRATEGY: MANAGING OFFLINE EXPANSION AND ONLINE INNOVATION AT CCYC

Lan Huang, Canadian Chess Youth Club
Vicky Nie, City University of Seattle, Canada

Note: This case is written in Chinese.

Case Objectives and Use

This case is designed to help students understand immigrant entrepreneurship and analyze strategic choices under resource constraints of CCYC, a chess club founded by a female immigrant entrepreneur. It discusses how gender, culture, and immigrant identity influence entrepreneurial leadership and organizational legitimacy. Students will develop analysis and decision-making skills in a cross-cultural and dynamic environment.

The case can be used in undergraduate and MBA courses in Strategy, Entrepreneurship, and Leadership. Analysis tools and frameworks such as SWOT, VRIO, and Porter's Five Forces will be used in analyzing the case.

Case Synopsis

CCYC (Canadian Chess Youth Club) was founded in 2016 by Lan Huang, a female immigrant entrepreneur in Toronto. Originally trained in performing arts, she gave up her career in China when she immigrated to Canada. She identified the opportunity in chess education by recognizing its benefits for youth development and community integration. Starting from a new and small-scale after-school tutoring at home, she gradually expanded CCYC into structured training, tournaments, and cultural exchange opportunities that integrated immigrant families into the broader Canadian community.

During the COVID-19 pandemic, CCYC moved the classrooms online to accommodate the students and families' needs. It soon turned into a scalable and accessible chess education centre. CCYC students also achieved good performance in international tournaments, which built it a distinguished presence in Great Toronto's competitive market. As demand increased, Lan faced a strategic dilemma. Parents encouraged her to expand CCYC's offline presence by opening additional training centers across Toronto, but the accelerated digital transformation highlighted the strategic importance of investing in online chess education platforms. With limited resources, Lan had to balance investment between offline expansion and online innovation. Should she focus on physical expansion to strengthen CCYC's community presence despite higher fixed costs, or prioritize digital innovation to capture broader growth opportunities while facing stronger competition.

The case also emphasizes the unique challenges and advantages faced by female immigrant entrepreneurs and explore how gender, cultural identity, and resource constraints shape entrepreneurial leadership and organizational strategy.

Suggested Theories for discussion:

1. Effectuation Theory
2. Resource-Based View (RBV) and VRIO Framework
3. Social Capital Theory

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BK CO., LTD.: OPPORTUNITIES AND CHALLENGES OF ESTABLISHING A JOINT VENTURE WITH A BRITISH PARTNER

Yi Ke, Shanghai Lixin University of Accounting and Finance
Ruicong Sang, Shanghai Lixin University of Accounting and Finance

Note: This case is written in Chinese.

Case Objectives and Use

The BK case study documents the common key challenges encountered in cross-border technological cooperation: in the context of localisation obstacles and strict regulatory environments, whether enterprises should shift from non-equity cooperation (such as export agents) to equity cooperation (such as joint ventures). This case is applicable to undergraduate, graduate, and MBA courses in "International Business", "Global Innovation Management", and "Emerging Market Entrepreneurship", helping students understand the complexity faced during internationalization, the challenges of technology introduction, and the key issues in building trust among partners.

Case Synopsis

In March 2017, Zhibang, the CEO of BK Company located in Hubei Province, China, was considering establishing a joint venture with KM Company, which is based in the UK. Although Zhibang was eager to introduce industry-leading technologies to gain a first-mover advantage in the market, he was still concerned about the potential risks associated with such a joint venture. If this joint venture was successfully established, it would be the first time that the two companies had collaborated with a foreign partner to set up a joint venture. Previously, BK mainly expanded its overseas market through export methods, while KM typically acquired innovative technologies and entered new markets through cross-border acquisitions. Initially, the two parties hoped to cooperate through a low-risk and low-cost export agency model. However, during the market promotion process, they encountered problems such as product localization and qualification application, prompting both parties to start considering a more in-depth cooperation model. Given that the two companies were of comparable scale and strength, the joint venture gradually became a natural choice. However, compared with their initial expectations of risks and capital investment, the investment and complexity required for the joint venture model significantly increased, forcing the CEO of BK to seriously consider whether to proceed with this decision.

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DONGGUAN BARRELED WATER: MULTIFAMILY BUSINESS MERGER AND INTEGRATION

Kok Lian WOO, Shenzhen Technology University
Zhao Dong GUO, Shenzhen Technology University
Xin Yan WANG, Shenzhen Technology University

Note: This case is written in Chinese

Case Objectives and Usage

This case is developed for financial management degree, especially courses on company merger and acquisition (M&A), post-merger integration (PMI), and multifamily business management. The target student groups are undergraduate students in management, accounting, finance, and business administration major. Through this case, students can understand complexity in multifamily business, merger and integration, and corporate governance. It serves as an excellent introductory case for business education. It helps students understand conflicting interests in multifamily business, and how to develop appropriate check-and-balance controls in finance, human resources, and business operations post merger.

Case Summary

This case is based on empirical research into the M&A and PMI processes of a multifamily business. It is reconstructed into a teaching case to highlight the decision-making challenges and points of conflict. It covers topics such as M&A, PMI, corporate and financial governance. The case involves M&A and PMI of three family-owned barrelled water companies in Dongguan, China. The case spans two years (2022–2023), and it demonstrates complexity in multifamily business and decision making such as equity and organizational structure, multi-stakeholders corporate governance, PMI transition, HR transformation from family members to professional managers, and mechanism for check-and-balance.

The case discusses the M&A decision making and PMI implementation processes. It highlights the inherent resistance and concerns of family members in the merger. The case also illustrates several key steps and decisions made in PMI process, which include recruiting a professional manager, installing tripartite financial and HR governance, agreeing profit distribution, and decision-making process. It highlights a dilemma that although the M&A gives the benefits of “stick together for mutual supports” but it also slows down the decision-making process and business growth due to the multifamily interests.

This case has three notable features. First, there is limited case study on multifamily businesses, especially on their creation and operations. The complexity in multifamily businesses centered around placement of family members and mutual checks and balances, which is understudy in current case literature. Second, barrelled water is still very popular in high-grade residential units and commercial offices, yet the industry receives little attention. Third, the multifamily business is gradually taking over by the second-generation family members, who have strong social networks and internet marketing experience. This will bring new operation models and social marketing developments to the business. A lot of new opportunities in a sunset business, especially with the rising of recycle economy.

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HW FACILITY MANAGEMENT OUTSOURCING: INNOVATION IN CONTRACT MODELS (PART A)

Kok Lian, WOO, Shenzhen Technology University
Xin Yan, WANG, Shenzhen Technology University

Note: This case is written in Chinese

Case Objectives and Usage

This case is developed for degree in property and facility management (PFM), particularly in courses covering contract governance, outsourcing performance, change and conflict management. The target student groups are MBA, EMBA, and graduate students in facility management (FM). Through this case study, students can understand various forms of business outsourcing, implementation criteria, and subcontract arrangements. The case focuses on making decision on a new contract model, resolving dilemma between business and functional departments, and selecting an appropriate business partner. The case allows students to understand complexity in contract governance and conflicting interests in a real-world setting.

Case Summary

This anonymized case reconstructs the journey of a multinational telecommunications equipment manufacturer (HW) in reforming its FM outsourcing operations. In October 2017, HW announced its plan to change its FM outsourcing contract from lumpsum and cost-plus models to Guaranteed Maximum Price (GMP) model. While GMP contracts can resolve many governance issues, the FM industry believed that Chinese companies were not ready for GMP. FM practitioners were shocked when HW revealed its plan to pilot run GMP model in three campuses. They were skeptical about HW's intentions, as GMP was a completely new contract model from the US, with no success case in China.

During implementation of GMP contracts, HW faced multiple challenges, including balancing multi-stakeholders' interests, determining risk-based fees and surplus sharing with service providers, and managing subcontractors, each of these could spark controversy and lead to a total failure. The Group VP believed that contract model reformation was a "people" issue. The GMP model moved many stakeholders' cheeses and required a completely new team to implement change.

However, how to localize and implement this advanced contract model remained full of doubts and uncertainties. If successful, it could resolve the low productivity and rigid operations in FM outsourcing. But if it failed, not only would the entire FM department need restructuring, but it could also trigger multiple spillover effects, impacting product delivery and business stability. Thus, this was both a pilot project and a high-risk gamble.

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QINGSHAN INDUSTRY: THE INTERNATIONAL GROWTH PATH OF AN EMERGING MARKET MULTINATIONAL ENTERPRISE

Chen Shimin, China Europe International Business School
Zhao Ling, China Europe International Business School

Note: This case is written in Chinese

Case Objectives and Use

Through this case study, students are expected to achieve the following objectives:

1. Understand the motivations for internationalization and the factors influencing location selection.
2. Understand the modes of entry into international markets.
3. Learn how Emerging Market Multinational Enterprises (EMNEs), despite lacking absolute competitive advantages, can gain an edge in international markets through opportunity identification and resource allocation.
4. Master how companies apply the AAA strategy (Adaptation, Aggregation, Arbitrage) for global development and how to respond to challenges in new international markets.

This case is suitable for graduate business students, MBA, EMBA, and executive training programs. It can be used in courses such as **Strategic Management** and **Global Business**, focusing on topics like globalization strategy selection, strategy implementation, and localized operations.

Case Summary

Since its founding in 2003, Qingshan Industry has grown from a local automotive window manufacturer into a global leader in the nickel and stainless steel sectors through technological innovation and resource integration. In 2023, Qingshan ranked 265th on the Fortune Global 500 list with revenues of \$53.98 billion.

In 2008, Qingshan overcame technical bottlenecks in laterite nickel ore smelting by independently developing the RKEF-AOD process, reducing steelmaking costs by 30% and laying the technical foundation for global expansion. That same year, the company seized the opportunity to collaborate with Indonesian nickel mines and began its industrial layout in Indonesia.

Facing challenges such as weak infrastructure and a shortage of industrial workers in Indonesia, Qingshan adopted a “Chinese team leading local employees” model, investing in supporting facilities like power plants, ports, and water pipelines. Through close cooperation with the Indonesian government and the Bintang Delapan Group, Qingshan successfully established the IMIP and IWIP industrial parks, forming a complete industrial chain from nickel mining to stainless steel production and new energy battery materials.

During its globalization process, Qingshan emphasized localized operations and ESG practices by hiring large numbers of local Indonesian employees, respecting religious and cultural customs, and investing in community welfare projects to build harmonious local relationships. It also collaborated with companies like CATL and Tesla to develop high-grade nickel and battery-grade nickel sulfate, entering the new energy sector. These efforts helped Qingshan gain a competitive edge in the Indonesian market.

Since 2024, Qingshan has deepened its presence in Zimbabwe, Africa, further developing chrome and lithium resources. Can Qingshan replicate its success in Indonesia in the Zimbabwean market? What improvements can be made?

SUSTAINABILITY FOR A BETTER FUTURE:

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THE HEALTH MANAGEMENT PATH OF GOLDWIND TECHNOLOGY

Yang Wang, University of International Business and Economics (faculty supervisor)

Yuan Wei, University of International Business and Economics (student author)

Note: This case is written in Chinese

Case Teaching Objectives and Usage

This case focuses on how a company integrates employee health management into its sustainable development strategy. This case is primarily suitable for teaching chapters related to “Health Management” in courses such as Sustainable Development Strategy and Human Resource Management. Target audiences include MBA, EMBA, and corporate management trainees, as well as undergraduate and graduate students in management programs.

This case uses Goldwind Technology’s development of health management as the main thread, exploring four key questions to achieve teaching goals across knowledge, skills, and competencies:

1. Why did Goldwind Technology incorporate employee health management into its sustainable development strategy? How does this decision reflect its core value of “long-term health” and the characteristics of the energy industry?
2. How did Goldwind Technology build its “health management system”?
3. How does digitalization empower employee health management at Goldwind? How should companies balance privacy protection with personalized interventions?
4. In the context of “Healthy China 2030” and high-quality corporate development, should Goldwind promote its health management model to supply chain partners, the industry, and communities? How can it be promoted to create sustainable impact?

Case Summary

Founded in 1998, Goldwind Technology is a global leader in clean energy, dedicated to making sustainable, reliable, and affordable energy accessible worldwide. With a focus on energy development, equipment, services, and applications, Goldwind leverages innovation and best practices to enhance renewable energy efficiency. As part of its sustainability strategy, Goldwind prioritizes employee health, embedding “long-term health” as a core value. The company established a Health Management

Committee and launched the “Three-Step Fast Walk” initiative, promoting wellness through systems, organization, and activities. Programs include a sports and cultural center, professional coaching, and campaigns like “1000 People, 100 Days” for fat reduction, supported by digital tools such as health records and OA system modules. At its December 2024 annual Health Management Committee meeting, Chairman Wu reported a nearly 10% rise in employee BMI compliance in 2023, though grassroots health data coverage remained limited. With ambitions to expand its health management model externally and in light of China’s “Healthy 2030” goals and growing industry competition, the committee faces key strategic decisions ahead:

1. How can digitalization further empower corporate health management?
2. Should Goldwind accelerate the promotion of its health management model to supply chain partners, the industry, or communities? How can it be promoted to create sustainable impact?

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THE MARKET LAUNCH OF WASHABLE MASKS

Jin Dai, ShanghaiTech University

Note: This case is written in Chinese.

Case Objectives and Use

This case is written in Chinese. It is designed for courses such as Innovation Management, Strategic Management, Business Ethics/CSR, and Sustainability. It's suitable for undergraduates and science graduates who have no working experience, MBAs, EMBA candidates, and corporate executives. Varieties of teaching for different type of students are suggested in the teaching note.

It examines the collision between sustainable product innovation and legacy regulatory frameworks during the COVID-19 pandemic. Students will confront core issues including resolving standards misalignment (e.g., bacterial filtration efficiency tests designed for disposable masks applied to reusable textiles), managing multi-stakeholder tensions (clients, regulators, testing bodies, consumers, and potential bad-faith actors), and making high-stakes decisions between abandoning an innovation versus advocating for systemic change. Through this case, learners develop skills in mapping innovation ecosystems using stakeholder analysis tools, applying cost-benefit frameworks to delayed innovation dilemmas, reframing regulators as potential co-innovators, and designing incremental risk-mitigation strategies for breakthrough sustainability ventures. No prerequisite knowledge is required, though familiarity with stakeholder theory enhances analysis.

Case Synopsis

In April 2021, Stella (a pseudonym), Market Director of Esquel Group, needs to make a critical decision. The flagship innovation of Esquel Group—a reusable, washable cotton mask developed during the COVID-19 pandemic to reduce disposable mask waste—has triggered a regulatory crisis. A Shanghai-based client informed Esquel that the local market regulator had issued a formal notice declaring the masks "non-compliant" after consumer complaints. Initial tests by authorities, using methodologies designed for traditional disposable medical masks, flagged Esquel's product as failing bacterial filtration efficiency (BFE) standards, contradicting Esquel's internal quality certifications. Evidence suggested the complaint originated from a professional "fake-fighter", exploiting regulatory gray zones around novel sustainable products. With fines pending and client relationships at risk, Stella must determine by June 2021 whether to challenge the ruling through costly appeals—potentially exposing deeper flaws in legacy testing systems—or accept penalties and abandon the eco-innovation. Set against the chaos of the pandemic PPE (personal protection equipment) market, the case highlights the precarious path for green innovators operating within rigid regulatory ecosystems.

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CASES WRITTEN IN SPANISH LANGUAGE

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Track Co-Chair: Josep Lluís Cano Giner, *ESADE Business School*

Cases	Authors
Are we in time to change? (¿ Estamos a Tiempo de Cambiar?)	Karen Boroff Isabel Ortiz Luis Salgado
Hugo Pork y el reto dela internacionalización (Pork and the Challenge of Internationalization)	Oscar Calderon
President Infantino, the challenge of restoring credibility to FIFA (Presidente Infantino, El Reto De Devolver La Credibilidad Organizacional A La Fifa)	Pablo Alamo Francisco Prada Jaime Alonso Gómez
Salud Bucal: The challenge of democratizing access (Salud Bucal: El Reto De Democratizar El Acceso)	Eric Geraldo Moreno Batista Sonia Read

**ARE WE STILL IN TIME TO CHANGE?
(¿ Estamos a Tiempo de Cambiar?)**

Isabel Ortiz, Polytechnic University of Madrid
Karen Boroff, Seton Hall University
Luis Salgado, Polytechnic University of Madrid

Note: This case is written in Spanish

Case Objectives and Use

This is a short case, developing students' competencies in understanding and applying the concept of resistance to organizational change and specifically resistance to change at the individual level. Given that it is a short case, it is especially geared to undergraduate students but given the age and the career moment of the protagonist, the case is also appropriate for graduate students. The learning objectives center on understanding the term "change agent," understanding and applying the sources of resistance to change at the individual level (as opposed to the organizational level), and developing strategies on how one might overcome his/her individual resistance to change. Potential courses are organizational behavior where the topic of change management is presented or a course in human resource management where talent development or career management is presented.

Case Synopsis

This short case centers on individual resistance to change, nested a career decision that a long-tenured faculty member at an international institution has before her—either to take a new position for the institution but outside her home country or to continue to grow her Center on Leadership and Technology in her home country. The case highlights the resistance to change in the theoretical literature, especially focusing on who is a change agent and why do individuals (as opposed to organizations) resist change and how to overcome that resistance. The case itself evolved from circumstances that arose in the late fall of 2024 in a university outside the United States. The case is disguised, as detailed in the Research Methods section of the Instructor's Manual.

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HUGO PORK AND THE CHALLENGE OF INTERNATIONALIZATION (Hugo Pork y el Reto dela Internacionalización)

Oscar Mauricio Calderon, Barna Management School
Francisco Vicioso, Barna Management School

Note: This case is written in Spanish

Case Objectives and Use

The purpose of this case is to develop knowledge related to the challenges of importing a local product or exporting a product concept manufactured in the country where it will be consumed and which can be considered “nostalgic,” as well as the marketing strategy to effectively carry them out in local and global markets. It can be used to delve deeper into market segmentation and selection.

In line with this, it seeks to develop learning on the following topics:

1. The selection, evaluation, and choice of potential markets, considering the added value of the product and the characteristics of each market.
2. Segmentation and positioning based on the chosen market and its respective characteristics.
3. Formulation of a value proposition based on the chosen segment.

Secondarily, the case also develops learning about:

1. Comparison of the Hispanic market in the US and the North American customer.
2. Generation of marketing strategy in international markets and opportunities in the nostalgia market.

The case can be used in introductory marketing courses in MBA programs, with an emphasis on the variables of segmentation and market selection, and as a complement to international marketing.

Case Synopsis

In June 2022, Hugo Beras Goico IV and Manuel Borrel faced challenges regarding the decision to internationalize their flagship product: Hugo Pork, a pre-cooked pork rind. After confirming that their product had been successful both locally and in its first test on the international market (Guatemala and El Salvador), they focused on the challenge of internationalizing the company, analyzing the strategic decisions they faced with limited resources and a local market with opportunities for development. The possibility of focusing on the Dominican diaspora in New York or the Californian market is explored, highlighting the differences between the two and the implications for marketing and distribution strategy. The text also details the growth of Hugo Pork in the Dominican Republic, including challenges such as the shortage of raw materials due to African swine fever, and the subsequent expansion to Guatemala and El Salvador through a strategic alliance.

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 2025 Conference, Newport Beach, California, USA, October 16-18, 2025. © 2025 by Oscar Calderon and Francisco Vicioso. Contact person: Oscar Calderon, Barna Management School, Av. John F. Kennedy 34, Santo Domingo, Dominican Republic, 809-7040853, oscar.calderon@barna.edu.do

**PRESIDENT INFANTINO: THE CHALLENGE OF RESTORING CREDIBILITY TO FIFA
(Presidente Infantino, El Reto De Devolver La Credibilidad Organizacional A La Fifa)**

Pablo Álamo, CETYS University
Francisco Prada, CESA University
Jaime Alonso Gómez, University of San Diego

Note: This case is written in Spanish

Case Objectives and Usage

This case is primarily designed for graduate students in MBA or master’s programs, especially in courses on corporate governance, leadership, and organizational reputation. It can also be adapted for advanced undergraduate courses aimed at raising awareness about conscious leadership and ethical decision-making.

The case provides opportunities to reflect on:

- Corporate governance as a strategic challenge in global organizations
- Organizational reputation, crisis management, and strategic communication
- Leadership qualities: proactivity, consistency, and credibility
- Empathetic and assertive communication and how to respond to “unfair” criticism

It is also useful for illustrating the skills of a conscious leader and exploring a central concept in corporate governance: the “tone at the top.” The case highlights the connection between leadership behavior, ethics, transparency, compliance, human rights, and organizational reputation.

Through this case, students will develop a critical and proactive capacity to analyze a reputational crisis and formulate responses aligned with the principles of corporate governance and conscious leadership.

Case Synopsis

The case addresses the dilemma faced by FIFA President Gianni Infantino in the days leading up to the 2022 Qatar World Cup, amid intense public criticism and calls for a boycott. The decision to award the first World Cup in the Middle East was made in 2010 during the presidency of Joseph Blatter, when Infantino was Secretary General of UEFA. Since then, the choice of Qatar has raised suspicions of irregularities and bribery, severely undermining FIFA’s legitimacy.

With growing international pressure just weeks before the tournament began, Infantino was forced to define a communication strategy in response to an institutional crisis that threatened not only FIFA’s reputation but also its credibility as a trustworthy leader. The case places students in Infantino’s position, challenging them to reflect on how to respond—whether with silence, defense, or critical distancing—while balancing the pressures from sponsors, governments, media, and civil society organizations.

The authors developed this case for classroom discussion rather than to demonstrate effective or ineffective handling of the situation. The case and teaching note were anonymously peer-reviewed for presentation at the NACRA 2025 Conference, held in Newport Beach, California, USA, from October 16–18, 2025. © 2025 by Pablo Álamo Hernández, Francisco Prada, and Jaime Alonso Gómez Contact: Pablo Álamo, CETYS University Calzada CETYS s/n, Colonia Rivera, Mexicali, Baja California, Mexico, CP 21259 Phone: +52 (686) 567-3700 Email: pablo.alamo@cetys.mx

SALUD BUCAL: THE CHALLENGE OF DEMOCRATIZING ACCESS
(Salud Bucal: El Reto De Democratizar El Acceso)

Eric Moreno, Barna Management School (faculty supervisor),
 Sonia Read, Salud Bucal (student author)

Note: This case is written in Spanish

Case Objectives and Use

This case was designed for MBA and executive education programs, especially within courses on operations strategy and service management. It is also relevant for electives on business strategy, healthcare management, sustainability, and strategic decision-making. The case can be used in face-to-face or virtual sessions focused on real-life decisions, strategic and operational dilemmas, and workshops that integrate quantitative data with qualitative criteria. It is particularly suitable for final assignments, group presentations, or integrative evaluations in modules on operational efficiency, financial analysis, and customer experience management.

Students will develop skills to:

- Analyze and evaluate the strategic tension between growth and consolidation in service delivery, considering social sustainability as a key criterion for decision-making.
- Apply operational and financial analysis tools to support strategic decisions under real-world pressures related to efficiency, quality, and profitability.
- Design integrated strategies for customer experience and service quality that align day-to-day operations with the organization's broader strategic objectives.

Case Synopsis

In September 2024, Eduardo Read Estrella, president of Salud Bucal S.A., a leading dental healthcare provider in the Dominican Republic, faced a critical strategic decision. The organization, founded in 1996 with a strong social mission to democratize access to oral healthcare, had grown to 28 clinics and served over two million patients. However, the expansion model was under pressure: some clinics were underutilized, profitability was uneven, and internal operational complexity was rising. At the same time, the market environment was shifting due to increasing competition, regulatory changes, and regional disparities in demand. Read Estrella had to determine whether to pursue further geographic growth or focus on consolidating and optimizing the existing network to ensure both financial sustainability and continued social impact.

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 2025 Conference, Newport Beach, California, USA, October 16-18, 2025. © 2025 by Eric Moreno and Sonia Read. Contact person: Prof. Eric Moreno, Barna Management School, Santo Domingo, Dominican Republic, +1 (809) 223-4409, eric.moreno@barna.edu.do

CORPORATE GOVERNANCE AND ETHICS CASES

Track Chair: Vijaya Zinnoury, *University of Denver*

Co-Chair: Theresa Coates, *Limestone College*

Cases	Authors
A Married Couple Confronting the French Lycée: Justice, Reparation, or Peace?	Pablo Alamo Monica Lopez Sieben Nathalia Franco
Man Enterprise – How Can a Construction Company Become ESG Compliant?	Randa Salamoun Yasser Akkaoui Yasmina Francis
Mid Atlantic University: Conflict Of Interest at the Farmers Market	Glenda Evans Ziette Hayes
Montefiore-UHC Dispute	Cathy Rehfus-Wilsek

A MARRIED COUPLE CONFRONTING THE FRENCH LYCÉE: JUSTICE, REPARATION, OR PEACE?

Pablo Álamo, CETYS Universidad
Mónica López Sieben, CETYS Universidad

Case Objectives and Use

This case is designed for use in courses on professional ethics, leadership, negotiation, and institutional governance, both within MBA programs and executive education settings. It is particularly relevant for students with professional experience in sectors such as education, law, nonprofit management, or institutional leadership.

The case presents a complex ethical-legal dilemma focused on the simultaneous pursuit of justice, reparation, and family stability following an alleged act of institutional negligence at a highly prestigious international school. It invites reflection on the limits of individual action in the face of structural power, as well as on the delicate balance between principles, personal interests, and collective goals.

Case Synopsis

In February 2017, D., a 12-year-old student at the *Liceo Francés A.C.* in Mexico City, suffered fractures in both arms after falling onto a stack of gym mats in a facility that was supposed to be closed or supervised. After three hours spent locating his family, and during which he received no additional medical attention at the infirmary, he was transferred to the hospital, where he underwent surgery; he was transferred to a hospital, where he underwent surgery. As a result of the accident, he lost approximately 20% of the mobility in one arm. Five months later, when his parents—Carmen and Íñigo, Spanish nationals residing in Mexico—attempted to re-enroll their two children, the school conditioned the enrollment on signing a letter waiving all liability for the incident.

The family was then faced with a critical dilemma:

Sign the waiver to ensure the academic and social continuity of their children, thereby avoiding a costly and emotionally draining legal battle in an unfamiliar judicial system;

Refuse to sign and initiate legal and reputational action against a powerful institution with diplomatic ties and the capacity to prolong the proceedings.

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 2025 Conference, Newport Beach, California, USA, October 16-18, 2025. © 2025 by Pablo Álamo Hernández y Mónica López Sieben. Contact person: Mónica López Sieben, Calzada CETYS s/n, Colonia Rivera, Mexicali, Baja California, México, CP 21259, +52 (686) 567-3700. Monica.lopez@cetys.mx

MAN ENTERPRISE: HOW CAN A CONSTRUCTION COMPANY BECOME ESG COMPLIANT?

Randa Salamoun, American University of Beirut (faculty supervisor)

Yasser Akkaoui, Capital Concept

Yasmina Francis, American University of Beirut (student author)

Case Objectives and Use

This case is designed to be used in a sustainability, governance, or business ethics course at the undergraduate or graduate level. It is suitable for courses in the BBA program, MBA program, or in an entrepreneurship or sustainability diploma.

Learning objectives:

- Describe the responsibility of the board vis-à-vis ESG.
- Understand the requirements for a transformation into a purpose-led organization.
- Understand ESG standards and principles for adequate sustainability integration.
- Measure return on investment of ESG integration.

Case Synopsis

In March 2022, Marwan Rizkallah, the general manager of Mondis, the waste management arm of MAN Enterprise Group, and head of the sustainability and waste management division of MAN, an international leader in the construction industry, was ecstatic by the impact, value, and opportunities that could derive from environmental, social, and governance (ESG) compliance in construction.

MAN was a leading construction company established in 1971 by Michel Abinader in Lebanon. Over the past 50 years, MAN expanded from its origins in engineering construction and became a major international player in the industry by diversifying its portfolio and opening new ventures worldwide. Rizkallah wanted MAN to reinforce its leadership position in the region and be the first construction company to become ESG-compliant; however, he recognized the difficulties that lay ahead, Lebanon was still in crisis, the board of directors of MAN was overwhelmed with other priorities including regional expansion, particularly in the Gulf and Europe, and the construction industry ranked third in terms of global CO₂ emissions. Rizkallah was wondering how to make the case to the board of directors to go beyond legal compliance and embark on the ESG journey? What concrete steps would MAN need to take to achieve ESG compliance?

This case presents an interesting opportunity to discuss the responsibility of the board vis-à-vis ESG compliance, the requirements for a transformation into a purpose-led organization, and the implementation of ESG standards and principles.

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MID ATLANTIC UNIVERSITY: CONFLICT OF INTEREST AT THE FARMERS MARKET

Glenda Evans, Hampton University
Ziette Hayes, Hampton University

Case Objectives and Use

This case is ideal for undergraduate business students. However, it can be adapted for MBA level students by increasing the emphasis on policy, strategy, and institutional governance in the discussion of questions and grading rubric. The case is designed to develop students' skills in ethical reasoning using Stakeholder Theory and Conflict of Interest frameworks. Students working on this case will not only apply these frameworks, but practice analyzing ambiguous ethical dilemmas. The protagonist is in a leadership role at her institution, and she is passionate about her personal endeavor as an entrepreneur. Engagement with the case will expose students to the challenges of making decisions amid competing obligations. They will also engage in stakeholder analysis and the role of transparent communication to mitigate reputational risks. The case materials include an instructor's manual, sample grading rubric for individual and group analysis, and a teaching plan for a 60-75 min session.

Case Synopsis

This case takes place in April 2025. The case protagonist is Dr. Georgia Ellis. She is the Chair of the Entrepreneurship Department at MidAtlantic. She must decide whether to participate as a vendor at a university-hosted Farmers Market. As Director of the Entrepreneurship Initiative and a founder of a family-run business, her dual role presents a potential conflict of interest. The decision point challenges students to analyze ethical dilemmas, stakeholder perspectives, and the balance between personal and professional roles. Dr. Ellis ultimately chose to participate.

The authors developed the case for class discussion rather than illustrate either effective or ineffective handling of the situation. The case and teaching note was anonymously peer reviewed for presentation at the NACRA 2025 Conference, Newport Beach, California, USA, October 16-18, 2025. © 2025 by Ziette Hayes and Glenda Evans. Contact person: Ziette Hayes Hampton University 100 E Queen St Hampton, Virginia 757-727-5166 ziette.hayes@hamptonu.edu and Glenda Evans Hampton University 100 E Queen St. Hampton, Virginia 757-964-7572 glenda.evans@hamptonu.edu

THE MONTEFIORE–UNITEDHEALTHCARE CONTRACT DISPUTE (2020-2024)

Cathy Rehfus-Wilsek, Xavier University of Louisiana

Case Objectives and Use

This case is targeted for undergraduate and graduate students in courses such as Healthcare Policy, Healthcare Administration, Negotiation Strategy, and Ethics. It addresses critical issues stemming from a real-world healthcare contract dispute, including negotiation strategy, ethical obligations of healthcare organizations, and patient access within the U.S. healthcare system. Through this case, students will develop skills in analyzing complex provider-insurer dynamics, evaluating ethical dilemmas related to patient care and financial sustainability, and formulating negotiation strategies that balance cost control with network adequacy and healthcare equity.

Case Synopsis

This case study examines the prolonged contract dispute between Montefiore Health System and UnitedHealthcare from 2020 to 2024, which disrupted care for approximately 60,000 patients in the Bronx and Mid-Hudson Valley—many of whom were low-income, Medicare, or Medicaid recipients. The conflict stemmed from Montefiore’s financial strain during the COVID-19 pandemic and its demand for increased reimbursement rates, contrasted with UnitedHealthcare’s focus on controlling rising costs. The case explores the impact on patients, especially those with chronic conditions, and analyzes the unprecedented intervention by Westchester County to restore access for its employees. Drawing on real patient narratives and the viewpoints of advocacy groups, policy experts, employers, and elected officials, the study highlights key ethical and strategic tensions. It offers a platform to explore provider-insurer dynamics, access to care, and healthcare equity, making it ideal for courses in healthcare policy, negotiation strategy, and ethical leadership.

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 2025 Conference, Newport Beach, California, USA, October 16-18, 2025. © 2025 by Cathy Rehfus-Wilsek, MD, MBA Contact person: Dr. Cathy Rehfus-Wilsek, MD, MBA, Xavier University of Louisiana, 1 Drexel Drive Box 52, New Orleans LA 70125, 504-520-7623, CRehfusW@xula.edu

DIGITAL TECHNOLOGIES AND OPERATIONS CASES

Track Chair: Zo Qazi, *Virginia Tech*

Co-chair: Fatih Yegul, *Conestoga College*

Co-Chair: Redwan Siddiqui, *Conestoga College*

Cases	Authors
Better Made Potato Chips: Adding Variety to Production	Alexander Miller
Fledge: The Empathy Algorithm - Balancing Mission and Growth in the Age of AI	Sidney J. Shapiro Daniel Pearson Abby Sugeng
Recovering Results: Data-Driven Repossession at Recovery Group LLC	Andy Sinclair
Shopify & Flexport: Strategic Pivot to Divest Logistics for Refocusing on Core Competencies	Redwan Siddiqui
Urban Company: From Insta Maids to Insta Mayhem	Sradhanjali Patra Shubham Nandi Kartik Arora Amol Subhash Dhaigude Debmallya Chatterjee
Vibrant Construction Equipment: Testing Time, Teams, and Tenacity	Sai Karthik Kumar Dharanikota Amol Subhash Dhaigude Swetha Bondalapati Soma Amol Dhaigude

BETTER MADE POTATO CHIPS: ADDING VARIETY TO PRODUCTION

Alexander Miller, Huron University

Case Objectives and Use

Better Made Potato Chips – Adding Variety to Production is an introductory level operations case targeted at teaching capacity calculations and incremental analysis. The case is designed with enough detail to challenge students to create a process flow diagram and calculate a line flow system capacity. The case then introduces various options with financial and practical implications for production.

Case Synopsis

The case study, prepared from an interview with the company officials, focuses on a beloved Michigan, USA snack company. The case begins by focusing on the production of chips and understanding the process to calculate capacity. The case then introduces the concept of variation in flavour and package size. The case explores the opportunity cost of making this change to a new product. The case also explores the incremental financial and environmental gains made possible by investing in cleaner sustainable technologies.

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 2025 Conference, Newport Beach, California, USA, October 16-18, 2025. © 2025 by Alexander Miller. Contact person: Alexander Miller, Huron University, 1349 Western Road, London ON, +1519 630 3246, amill64@uwo.ca

**FLEDGE:
THE EMPATHY ALGORITHM – BALANCING MISSION AND GROWTH IN THE AGE OF AI**

Sidney Shapiro, University of Lethbridge (faculty supervisor)
Daniel Pearson, University of Lethbridge (student author)
Abby Sugeng, University of Waterloo (student author)

Case Objectives and Use

This case is suitable for upper-level undergraduate, MBA, and executive MBA courses in entrepreneurship, strategic management, business ethics, or innovation management, particularly where social impact or EdTech ventures are emphasized. It centers on the strategic and ethical tensions faced by a mission-driven startup navigating investor expectations, AI integration, and the preservation of its human-first values in children’s emotional education.

Students will examine how founder identity shapes decision-making, how stakeholder goals conflict or align, and how trust can be sustained during growth. The case fosters skills in ethical analysis, stakeholder mapping, and strategic planning under uncertainty, particularly in contexts involving emerging technologies and sensitive user groups.

Case Synopsis

Fledge is a mission-driven EdTech startup that delivers social-emotional learning (SEL) to children through a human-first digital platform. Founded by Jenna Galloway, Fledge emerged from her in-person wellness studio and expanded rapidly during the COVID-19 pandemic. The platform blends movement, mindfulness, and emotional education to support children's mental well-being. As adoption grows, investors are urging AI integration to personalize content and enable scale. Galloway, however, fears compromising the trust and empathy central to Fledge’s identity. This case presents a strategic crossroads where innovation, ethics, and stakeholder interests intersect. Students are asked to evaluate the trade-offs of different AI strategies, consider stakeholder alignment, and propose an action plan that balances growth and mission integrity. It is suitable for courses in strategy, entrepreneurship, business ethics, and innovation management, and invites discussion on responsible leadership in technology-enabled education.

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 2025 Conference, Newport Beach, California, USA, October 16–18, 2025. © 2025 by Sidney Shapiro, Daniel Pearson, and Abby Sugeng. Contact person: Sidney Shapiro, University of Lethbridge, 4401 University Drive West, Lethbridge, Alberta, Canada T1K 3M4. Email: sidney.shapiro@uleth.ca

RECOVERING RESULTS: DATA-DRIVEN REPOSSESSION AT REPO GROUP LLC

Andy Sinclair, Florida Atlantic University

Case Objectives and Use

This case is designed for undergraduate courses in business analytics, operations management, or data-driven decision-making. Students use descriptive analytics on real repo operations data to identify performance drivers, evaluate trade-offs under capacity constraints, and design an intake-only triage (accept / bucket / decline) that balances efficiency with client expectations and 24-hour first-touch targets. By the end, students will (1) build defensible descriptive baselines, (2) propose rules with capacity guardrails and KPIs, and (3) communicate recommendations with a brief stakeholder-ready rationale and fairness audit.

Case Synopsis

Recovery Group LLC, a Pennsylvania-based auto repossession firm, faces a late-2024 surge in assignments alongside declining recovery performance and rising client pressure. Leadership mandates a 30-day turnaround to improve outcomes without adding staff. Acting as an internal analytics team, students analyse a seven-month, 37,625-assignment dataset to uncover patterns in recovery rate, cycle time, and client behaviour. With limited intake signals (e.g., assessed score, prior LPR activity, direct-client status, recent title record), students must propose a triage strategy; accept, decline, or passive “bucket”—with capacity guardrails, KPIs (recovery rate, days-to-recovery, first-touch %), and a monthly fairness audit. The case emphasizes descriptive analytics, operational trade-offs, and stakeholder alignment in a constrained service environment.

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 2025 Conference, Newport Beach, California, USA, October 16-18, 2025. © 2025 by Andy Sinclair. Contact person: Andy Sinclair, Florida Atlantic University 777 Glades Rd, Boca Raton, FL 33431, 302-388-3195, sinclaira2024@fau.edu

SHOPIFY & FLEXPOR: STRATEGIC PIVOT TO DIVEST LOGISTICS FOR REFOCUSING ON CORE COMPETENCIES

Redwan Siddiqui, University of Waterloo (student author)

Case Objectives and Use

This case is designed for use in strategic management, supply chain management, and technology management courses at the undergraduate and graduate levels. It is also suitable for discussions in leadership and entrepreneurship contexts. The case provides students with an opportunity to analyze the strategic decision-making process of a leading e-commerce company facing a critical choice between vertical integration and specialization. It encourages exploration of the trade-offs involved in such decisions and highlights the importance of aligning business strategy with core competencies and technological capabilities in a rapidly evolving digital economy.

Case Synopsis

In January 2023, Shopify Inc., a global leader in e-commerce infrastructure, faced a pivotal strategic decision: whether to continue investing in its logistics operations or divest them to Flexport, a U.S.-based supply chain technology firm. Shopify had ventured into logistics to compete with Amazon, culminating in its \$2.1 billion acquisition of Deliverr, a San Francisco-based fulfillment startup. However, the post-pandemic slowdown in e-commerce growth, operational complexities, and investor concerns prompted a re-evaluation of this strategy. The company's core strength lay in its scalable, cloud-based e-commerce platform, which empowered millions of merchants worldwide.

As Shopify's logistics ambitions strained resources and distracted from its software focus, CEO Tobi Lütke considered divesting the logistics arm to refocus on core competencies. Flexport, a trusted partner with a tech-driven logistics platform, emerged as a suitable acquirer. The proposed divestiture would allow Shopify to streamline operations, reduce workforce redundancies, and restore investor confidence, while enabling Flexport to expand its end-to-end logistics capabilities. This strategic pivot highlighted the trade-offs between vertical integration and specialization. Retaining logistics could have positioned Shopify as a formidable end-to-end commerce platform but at the cost of capital intensity and strategic dilution. Ultimately, the decision underscored the importance of focus and adaptability in a rapidly evolving digital economy, with Shopify choosing to remain committed to its mission to empower merchants through world-class e-commerce solutions.

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URBAN COMPANY: FROM INSTA MAIDS TO INSTA MAYHEM

Amol S. Dhaigude, S P Jain Institute of Management and Research
 Debmallya Chatterjee, S P Jain Institute of Management and Research
 Sradhanjali Patra, S P Jain Institute of Management and Research
 Shubham Nandi, S P Jain Institute of Management and Research
 Kartik Arora, S P Jain Institute of Management and Research

Case Objectives and Use

This case will be useful for students of business and economics, services operations management, service marketing to formulate strategies on how to tackle and implement strategy for new service design and development in a highly unorganized and in-elastic market while fulfilling the stated and latent need of the consumers. Key learning objectives include, but are not limited to:

- Understand the different stages of the Double Diamond Framework, i.e, Discover, Define, Develop, and Deliver. And further explain their relevance in the service innovation.
- Identify the importance of inclusive and iterative service design, which can be achieved by balancing the consumer needs, worker dignity, and operational feasibility.
- Analyze the key challenges while designing new services in the gig economy. This would include focusing on standardization, pricing strategies, and workforce management.
- Evaluate the cause behind the public backlash and early failure of the new service launch in the unorganized and inelastic market.
- Critically evaluate the ethical dilemmas surrounding the service-driven labor platforms, mostly regarding worker autonomy, fairness, and surveillance.
- Create a stakeholder engagement plan to foster long-term collaboration with the gig workers, society organizations, and consumers.
- Apply the design thinking principles to evaluate about the real-world service innovation, considering both stated and latent consumer needs.

Case Synopsis

This case explores Urban Company's (UC) controversial launch of "Insta Maids" in March 2025, an instant house-help service that promised to deliver a trained domestic worker to customers within 15 minutes. While UC had earned a reputation for organizing the gig economy and empowering service professionals through training, income assurance, and safety protocols, this particular launch triggered a strong backlash. The use of the term "maids" in the service name was viewed by many as insensitive and exploitative, sparking criticism from labor unions, social media users, and civil society groups. The case highlights a key conflict: UC intentions to modernize and professionalize the unorganized domestic help sector clashed with India's complex socio-cultural realities. Deep-rooted issues of gender, caste, class, and informal labor exploitation resurfaced, challenging the company's ethical standing and communication strategy. Despite the operational soundness of the service model, which included real-time tracking, transparent pricing, and gig worker protections, the narrative around human dignity and platform accountability quickly took center stage. UC responded by rebranding the service to "Insta Help," but the larger questions remained. Could the company reconcile operational efficiency with ethical labor practices? Would this innovation succeed in a sector marked by stigma and systemic neglect? The case encourages students to reflect on responsible innovation, stakeholder sensitivity, service design, and the ethical boundaries of platform-based businesses operating in sensitive sectors.

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 2025 Conference, Newport Beach, California, USA, October 16-18, 2025. © 2025 by Amol S. Dhaigude, Debmallya C.Sradhanjali Patra, Shubham Nandi, and Kartik Arora. Contact person: Amol S. Dhaigude , S P Jain Institute of Management and Research (SPJIMR), Bhavan's Campus, Munshi Nagar, Mumbai, Maharashtra, India – 400058, +91 88788 39555, amol.dhaigude@spjimr.org

ENTREPRENEURSHIP, FAMILY BUSINESS, AND SMALL BUSINESS CASES

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

Co-Chair: Sarah Holtzen, *Missouri Southern State University*

Cases	Authors
Beyond the Book Launch: Can Entrepreneurs Rewrite the Rules for Author Branding?	Dale L. Crawford
Cafe at The Corner: Balancing Community, Capacity, and Change	Rebecca Wilson
Chasing Rainbows: Building an Ammolite Adventure from Riverbeds to Retail	Sidney J Shapiro Daniel Pearson Kateryna Zaremba Luana Kovalski Yuliia Ziuzko
Conquering Condo Chaos: Strategic Resilience and Smart Risk in Climate-Sensitive Real Estate	Prieya Kumar
Country Boy Kitchen: Growth Challenges in a Soul Food Venture	Stepheca M. Sawyer Vonnice Boone Jason Moore Jeffrey Meade
Ginger Health: Does Scalability Translate to Profitability	Sonali S. Vinnakota
Hearts, Minds, and Margins: The Art of Relationship-Based Business Buying	Callie Huber Alex Bolinger
ImmiCan: Scaling Social Innovation for Foreign-Trained Physicians in Canada	Sidney J. Shapiro Daniel Pearson
Khonology Digital Solutions (Pty) Ltd: Values Driven Entrepreneurship	Judy Nobuhle Dlamini
Munchified Freeze-Dried: Go Big or Stay Home?	Terry McGovern Charles Hilterbrand
Neighbourhood Entrepreneurship: The Story of the Fernwood Collective	William Holmes Amy Zidulka
Pitching an IP-Based New Venture	Jeff Moretz
Plaeto: The “Multiplay” Disruption in the Indian Athletic Footwear Market	Ram Subramanian Sonia Mehrotra Vijay Krishnamurthy
Plaza Beach Resorts: Responsible Redevelopment	Jerry Zibrida

Purpose Meets Profit: Eximus Education, UK	Sadaf Taimoor Rajan Shah Mohsin Adhi
Rooted in Opportunity: Evaluating a High-Stakes Decision for a Budding Entrepreneur	Cheryl Mitteness
Sankofa: A Health and Wellness Odyssey into the Heart of Oceans	Imhotep Paul Alagidede Immaculate Simiso Nxumalo Sr.
Scaling Woo Girl Weekend Wear	Brian G. Nagy Steven W. Day
The Blue Flame: Wrap It Up or Stick It Out?	Marilyn Taylor Theresa Coates Vijaya Zinnoury Xiaohua Yang
The Local Butcher: Keeping Traditions Alive Review Case	Danya Marhamo
The Real State of Real Estate : Identifying Target Customers of Home Buyers, What Strategy Should Melvin India Infra Private Limited Use?	Punyaslok Dhall
VocalEase	Robert A. Boyle James Fisher Stephanie Tennill

**BEYOND THE BOOK LAUNCH:
CAN ENTREPRENEURS REWRITE THE RULES FOR AUTHOR BRANDING?**

Dale L. Crawford, University of South Florida (student author)
Matt Mullarkey, University of South Florida (faculty supervisor)

Case Objectives and Use

The case is designed for courses in entrepreneurship, marketing strategy, branding, small business creation, digital marketing, marketing management, and business strategy. It is suitable for undergraduate, MBA, and executive education students. Students will have the opportunity to analyze an industry for entrepreneurial opportunities as well evaluate different go-to-market models for branding and profitability of self-employment ventures.

Case Synopsis

Amanda Capener, a self-described introvert and former kindergarten teacher without any aspirations of being in the public eye or being an entrepreneur, unexpectedly finds herself at the threshold of a promising career as a historical fiction author with her debut novel, *Under the Scottish Sky: A Beauty and the Beast Retelling*. With Amanda's limited experience utilizing digital marketing and managing a brand, she struggles knowing that she will be expected to take an active role in the marketing of her book, largely through self-promotion.

As Amanda approaches her book launch, she faces critical decisions about balancing creative writing and promotional responsibilities, her level of engagement in supplemental marketing activities, and deciding whether to outsource certain marketing tasks. With the modern publishing industry as the backdrop, the case encourages students to adopt an entrepreneurial mindset, viewing Amanda and authors like her, as potential customers for innovative and market disrupting solutions.

By clearly positioning Amanda's real-world challenges as market gaps, students can choose to identify opportunities for niche businesses, scalable technology solutions, or specialized service agencies. The case provides insights into various marketing strategies, including virtual assistants, digital marketing, influencer partnerships, and advanced technologies such as AI-driven marketing and AR/VR tools.

In addition to considering entrepreneurial options, the narrative provides an opportunity for personal reflection on self-employment opportunities, by putting oneself into the protagonist's shoes. Amanda's situation captures the essence of common foundational self-employment challenges: assessing personal strengths and limitations, maintaining authenticity, strategically investing of resources for growth, and navigating the balance between creative core work and commercial success.

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CAFÉ AT THE CORNER: BALANCING COMMUNITY, CAPACITY, AND CHANGE

Rebecca Wilson, Lindenwood University
SherRhonda Gibbs, Morehouse College
Sambhavi Lakshminarayanan, Medgar Evers College

Case Objectives and Use

This case has been prepared for students to understand, analyze and develop responses for a small business. This business operates in an area within the hospitality industry that is familiar to almost everybody (food services) and students will be able to readily relate to it. Through studying this case, students will gain insight into operational and strategic risks faced by small, community-oriented businesses. In addition to identifying and assessing these risks, they will learn to: apply analytical tools and frameworks (SWOT, PESTEL, Porter's Five-Forces); perform Stakeholder Analysis; explore Contingency Planning; understand the integration of technology into business operations; develop strategic and operational recommendations. This case can be used in both undergraduate and MBA programs. Suitable courses are: Strategic Management, Small Business Management, Hospitality and Tourism Management, and Entrepreneurship/ Public Policy. The case was developed through primary sources (to identify critical issues the business is facing) and secondary sources (to provide information about the setting and current business environment).

Case Synopsis

The protagonist (Maria) is the co-owner of a restaurant located in a major metropolis (New York City). The restaurant is an anomaly in being small and independently owned in an area where there are plenty of both chain restaurants and high-end eateries. The business has survived for more than 25 years, through seismic changes in its neighborhood, by being nimble. This case describes the situation in the time period 2024-2025 (ongoing); of specific note are changes that occurred in the business environment in the immediate aftermath of the pandemic. These changes have had a lingering impact on the business, and even permanently affected the business model (including the menu and customer behaviors). Currently the business is facing significant new challenges from two fronts, a drastic reduction in capacity due to changes in a city regulation and (very likely) higher operational costs due to a city-imposed fee for all vehicles entering the area where it is located. It is urgent and imperative that Maria come up with quick responses to meet these challenges.

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**CHASING RAINBOWS:
BUILDING AN AMMOLITE ADVENTURE FROM RIVERBEDS TO RETAIL**

Sidney Shapiro, University of Lethbridge (faculty supervisor)
Daniel Pearson, University of Lethbridge (student author)
Kateryna Zaremba, National University of Kyiv-Mohyla Academy (student author)
Luana Kovalski, Universidade Federal do Paraná (student author)
Yuliia Ziuzko, Sumy State University (student author)

Case Objectives and Use

This case is designed for senior undergraduate, MBA, and executive education courses in entrepreneurship, strategy, operations, or family business. It is especially well-suited to contexts where students are asked to navigate growth in resource-constrained, founder-led, or artisanal ventures. The case offers rich opportunities to analyze the operational, strategic, and stakeholder tensions that arise when a niche business seeks to scale without compromising its identity.

Students will gain experience in evaluating scale-up options, applying resource-based and stakeholder theories, and assessing operational bottlenecks in craft-intensive businesses. The case also encourages critical thinking around the trade-offs between control and delegation, trust and expansion, and product authenticity versus market reach.

Case Synopsis

In June 2025, Mark Turner and Caitlin Furby, co-founders of Dinosty Fossils, face a critical growth decision. Based in Southern Alberta, Dinosty specializes in ammolite—a rare, fossilized gemstone with significant commercial and cultural value, found only in the region’s Bearpaw Formation. Turner and Furby have built a vertically integrated, founder-led venture that combines direct fossil extraction, proprietary artisanal finishing, and provenance-driven sales to international collectors.

Having secured the largest portfolio of small-firm ammolite claims globally, Dinosty holds a unique strategic resource. However, the business now confronts capacity bottlenecks in extraction, processing, and sales. The founders must choose among three strategic paths: expand fossil recovery, scale artisanal processing through apprenticeships and training, or pursue a phased, balanced scale-up. The case presents a rich context for analyzing growth sequencing, resource-based advantage, stakeholder alignment, and how entrepreneurial ventures preserve brand integrity during scale transitions.

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CONQUERING CONDO CHAOS: STRATEGIC RESILIENCE AND SMART RISK IN CLIMATE-SENSITIVE REAL ESTATE

Prieya Kumar, University of South Florida (student author)

Case Objectives and Use

This applied decisional case explores the strategic challenges of investing in climate-sensitive multifamily housing. Though set in Florida, it reflects global concerns around climate risk, economic volatility, and sustainable development. Students integrate financial analysis with scenario planning, governance, and resilience—skills essential in regions facing global warming, trade disruptions, and rising housing demand. It suits advanced business and real estate courses focused on decision-making under uncertainty.

Course Types: Real Estate Finance, Strategic Management, Risk Analysis, Business Administration, Organizational Decision-Making, ESG and Resilience Strategy.

Target Students: MBA, DBA, MSRE, Graduate-level learners in finance, strategy, and real estate tracks.

Topics: Multifamily housing investment, condominium governance, strategic scenario planning, climate-sensitive asset evaluation, regulatory impact analysis, disaster resilience, behavioural risk, insurance volatility, CAP rate modelling.

Skills/Insights: Students will **(1)** conduct SWOT analysis in real estate contexts; **(2)** calculate and interpret CAP rate metrics; **(3)** apply resilience and behavioural risk frameworks; **(4)** evaluate governance structures and COA financials; **(5)** integrate macroeconomic and microeconomic indicators into investment decisions; and **(6)** assess strategic options under uncertainty and advise the protagonist on acquisition strategy.

Purpose: This case intends to equip students with a structured framework for evaluating multifamily housing investments in volatile real estate environments, bridging financial modelling with strategic decision-making through role-play, collaborative exercises, and comparative analysis.

Theoretical Basis: The case draws on multifamily housing theory (Zietz, 2003), investment risk management (Baker & Filbeck, 2015), disaster resilience frameworks (Mansoor et al., 2023), behavioural risk theory (Addo et al., 2025), and strategic investment models (Bril & Schramade, 2023). It also integrates CAP rate valuation (Chen, 2024), commercial real estate classification (Homayoun, 2024), and regulatory impact studies (Psarianos, 2024) to support interdisciplinary learning.

Case Synopsis

Doug Ramsey, a seasoned investor, evaluates a 14-unit condo portfolio in climate-sensitive St. Petersburg, Florida. He weighs full, partial, or no acquisition using a proprietary model blending financial metrics, risk management, resilience theory, and regulatory analysis. The case explores governance, insurance, market dynamics, and disaster risk. It highlights strategic decision-making in multifamily housing under Florida's evolving condo laws, with global relevance to investors facing climate and economic uncertainty, rising insurance costs, and the need for sustainable housing solutions in high-demand markets.

Keywords: *Real estate investment, multifamily housing, CAP rate, risk management, resilience, governance, Florida condo law, strategic analysis, behavioural risk, scenario planning, climate risk, sustainability, macroeconomic volatility.*

The author developed the article to propose future directions and evolution of case Pedagogy or Research. The article was anonymously peer reviewed for presentation at the NACRA 2025 Conference, Newport Beach, California, USA, October 16 - 18, 2025. © 2025 by Prieya Kumar. Contact person: Prieya Kumar, University of South Florida, Muma College of Business, 4202 E Fowler Ave, Tampa, FL 33620, Mobile: 952-486-2037, Email: prieyakumar@usf.edu

COUNTRY BOY KITCHEN: GROWTH CHALLENGES IN A SOUL FOOD VENTURE

Vonnice J. Boone
Jeffrey Meade, Paul Quinn College
Jason Moore, Paul Quinn College
Stepheca M. Sawyer, Morgan State University

Case Objectives and Use

This case is designed for undergraduate and MBA students in entrepreneurship, small business management, and strategic leadership courses. It addresses critical issues in small business scaling, including workforce management challenges, operational delegation decisions, and the tension between maintaining founder involvement versus enabling systematic growth.

Students will explore how cultural identity serves as both a competitive advantage and business constraint while examining unique challenges faced by minority-owned businesses. Through analyzing Jeffrey Lampkin's dilemma, students develop skills in strategic decision-making under resource constraints, crisis management, and stakeholder impact assessment. The case provides opportunities to discuss effectuation theory in practice and examine the emotional challenges of transitioning from hands-on operator to strategic manager.

This case is particularly valuable for programs seeking authentic stories of Black entrepreneurship and community-centered business models.

Case Synopsis

Set in April 2025, this case follows Jeffrey Lampkin, founder and owner of Country Boy Kitchen, a soul food restaurant venture in Sumter, South Carolina. Lampkin built his business from a single location opened in June 2019 into a multi-revenue-stream enterprise generating over \$500,000 annually.

Despite surviving the COVID-19 pandemic, unauthorized food giveaways by employees have cost over \$150,000 in six years. As expansion opportunities present themselves, Lampkin confronts a critical decision: maintain hands-on control to preserve quality and minimize losses or delegate authority to managers and risk further financial bleeding to pursue growth opportunities that could transform Country Boy Kitchen into a regional restaurant brand.

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GINGER HEALTH: DOES SCALABILITY TRANSLATE TO PROFITABILITY?

Sonali S. Vinnakota, University of South Florida (student author)
Matthew Mullarkey, University of South Florida (faculty supervisor)

Case Objectives and Use

This case is designed to keep in mind business students in MBA, DBA and Entrepreneurship programs. However, the course works well in several other contexts like health care business strategy, leadership and organizational behaviour, and marketing courses. The case study aligns well with discussions on scalability vs. profitability in small businesses and as a real-world example of financial challenges and funding dilemmas for small businesses. It also presents a decision-making framework for entrepreneurs balancing morality and profitability.

Case Synopsis

Dr. Ginger Le, a Physical Therapist by profession and the founder of Ginger Health & Fitness (a Physical Therapy & Rehab Clinic based out of Tampa, Florida) is at a critical juncture regarding her business sustainability. Having expanded her physical therapy practice to four locations with a staff of 24, she now faces increasing operational costs and a cash flow crisis. Marketing efforts have failed to generate sufficient new patient acquisition, and insurance payment delays exacerbate financial strain. Despite attempts to streamline expenses, challenges persist. Dr. Le must evaluate strategic options: should she downsize her operations, outsource administrative functions, or invest in targeted marketing?

Alternatively, securing financing, filing for bankruptcy, or shutting down the business remain extreme considerations. The fundamental question remains: Can Ginger Health achieve financial sustainability without compromising on patient care? Dr. Le has a few options to explore:

1. Hire a professional marketing & PR firm
2. Reduce the number of centers from 4 to just one or two that can be managed more easily and efficiently.
3. Reduce operating costs
4. Take financing to revamp the business
5. Reorganize existing staff, outsource most administrative tasks and accounting, and work with part-timers, interns or volunteers.
6. File for bankruptcy or
7. Wind down the business

Ginger Health exemplifies the paradox of expansion vs. sustainability. Starting as a home-based therapy service, it grew into a multi-location practice. While its patient care philosophy remains strong, financial difficulties—including high overhead costs, payroll struggles, and ineffective marketing investments—threaten its profitability. The case explores how Dr. Le can align financial sustainability with quality patient care.

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HEARTS, MINDS, & MARGINS: THE ART OF RELATIONSHIP-BASED BUSINESS BUYING

Callie Huber, Idaho State University (student author)
Alex Bolinger, Idaho State University (faculty supervisor)

Case Objectives and Use

This case provides students with an experiential learning opportunity to grapple with an ambiguous, multifaceted business situation. It allows them to practice developing financial models, evaluate small business viability under uncertain assumptions, and engage in strategic decision-making influenced by interpersonal dynamics.

This case is intended for use in undergraduate and graduate business programs, particularly in courses on entrepreneurship, negotiation, finance, strategy, and small business management. The material is best introduced after foundational knowledge has been built in valuation and negotiation strategy. It is well-suited to capstone courses or modules where students are expected to synthesize knowledge across disciplines. Instructors may assign students to create their own financial analyses and integrate quantitative reasoning with ethical and interpersonal considerations.

Case Synopsis

This case describes a decision point for young couple Reagan and Jay Smith, who have been presented with an opportunity to acquire and operate a grain elevator operation in tiny eastern Idaho. Their motivations extend beyond pure economics, because Reagan and Jay seek to protect a family legacy, stimulate local agricultural commerce, and fulfill their own entrepreneurial ambitions. However, the process is complicated by several factors, including the seller's reluctance to provide full financial transparency, emotionally biased valuations, and trust issues embedded in close-knit community ties.

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**IMMICAN:
SCALING SOCIAL INNOVATION FOR FOREIGN-TRAINED PHYSICIANS IN CANADA**

Daniel Pearson, University of Lethbridge (student author)
Sidney Shapiro, University of Lethbridge (faculty supervisor)

Case Objectives and Use

This case helps instructors evaluate its fit by outlining target courses, student levels, core issues, and learning outcomes. It is ideal for MBA and senior-undergraduate programs at the nexus of social impact, regulatory complexity, and technology strategy. In Social Entrepreneurship classes, ImmiCan’s fee-for-success model highlights trade-offs between mission fidelity and financial viability. In Strategic Management, students apply SWOT and resource-based analyses to Saad’s choice among rapid scale via licensed partners, a U.S. pivot, or lean mission-aligned growth. Healthcare Strategy courses explore digital platforms’ role in alleviating rural “medical deserts,” while Technology and Innovation modules dissect agile MVP development, volunteer prototyping, and explainable AI design. Public Sector Innovation offerings examine ImmiCan’s data-sharing negotiations and B2G pilots with health authorities.

By engaging with ImmiCan’s strategic crossroads—fragmented licensing, digital barriers, founder fatigue, and ethical funding—students will learn to map stakeholder ecosystems, design iterative experiments, and make high-stakes decisions that balance speed, control, and mission under capital constraints.

Case Synopsis

March 2025. Saad Khan, the solo founder of ImmiCan, stood at a critical juncture in his mission-driven startup. ImmiCan had emerged from a grassroots mentorship program into a web-based platform designed to match foreign-trained physicians with Canada’s rural and remote communities—areas where chronic doctor shortages left residents traveling long distances for basic care. By ingesting province-by-province licensing rules, rural incentive programs, and real-time job postings into a transparent scoring engine, ImmiCan had placed seventeen doctors and slashed average integration timelines from four years to six months. Yet with runway down to weeks, Saad confronted a stark choice: partner with licensed recruiters to unlock rapid revenue (but cede control and mission purity), pivot to the larger U.S. market (but risk mission drift and unfamiliar regulation), or maintain a lean, volunteer-driven model (but accept slow growth and persistent funding gaps). Each path carried profound implications for ImmiCan’s sustainability and social impact.

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KHONOLOGY DIGITAL SOLUTIONS (PTY) LTD: VALUES DRIVEN ENTREPRENEURSHIP

Judy N. Dlamini, Wits University (student author)
 Claire Beswick, Wits University (faculty supervisor)

Case Objectives and Use

The case is targeted at Masters level, MBA or Masters in Entrepreneurship and executive courses on strategy for scaling of business. It is designed to teach Strategic Entrepreneurship decisions about growth direction (e.g., geographic expansion, sector diversification, product vs. service model). Analyse strategic growth dilemmas for a service-based tech firm in Africa. Apply theoretical frameworks (e.g., Ansoff Matrix, SWOT, Value Chain) to real-life strategic choices. Understand the relationship between values and entrepreneurial success and design scalable strategies for values-based businesses. The desired outcomes are for students to understand the evolution of a startup through bootstrapping, use of networks and building culture through talent development from disadvantaged communities. Understand entrepreneurial learning through experimentation and failure (e.g., eSwatini), and the importance of value alignment of business partners, exploring growth strategies. Understand some of the entrepreneurial.

Case Synopsis

Khonology Digital Solutions, established in 2013 as a technology service provider with a vision of becoming Africa's leading digital enabler, had been founded by four young Africans around a friendship and value system that went beyond making a profit. Khonology had been built around working with clients to digitise their processes and systems to streamline service delivery. It had offices in Johannesburg and had worked on projects in Nigeria, Malawi, Tanzania, Ghana and Mauritius, among others. It was September 2023 and ten years since Dapo Adeyemo, Africa Nkosi, Mosa Nyamande and Michael Roberts had founded Khonology. In that period, they had come a long way to achieve this vision, but there was still a way to go. Now Adeyemo, Nkosi and Nyamande, who formed the management team of the business, were considering how the company could move out of the shadows and truly achieve its goal of digitising the African continent and expanding its services to the rest of the world. Khonology's main clients were in the financial services industry. The expansion to different parts of the continent occurred mainly because the company followed the needs of its existing client into their other branches in Africa. Their expansion to eSwatini using a different strategy, failed. Khonology's aim to digitise the continent of Africa had not changed. Instead the vision had got bigger, and the company was now looking to expand beyond the continent, starting in the UK and Saudi Arabia. The founders were exploring adding products to their offering.

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MUNCHIFIED FREEZE DRIED: GO BIG OR STAY HOME?

Terry McGovern, University of Wisconsin Parkside
Charles Hilterbrand, University of Mississippi

Case Objectives and Use

This case is useful in a 100-200 level undergraduate course on entrepreneurship or family business. We feel the case will appeal to many students who are already doing their own side hustles as they ponder whether to grow to remain the same size. The case requires students to consider the risk/rewards associated with expanding a business using a Strengths, Weaknesses, Opportunities, Threats (SWOT) analysis, a Cost Benefit Analysis (CBA) model, as well as a Weighted Scoring Model Approach (WSMA). The SWOT can help a firm determine whether growth is feasible and strategically viable. Once the SWOT is understood, then a CBA is useful to consider the financial and operational costs associated with scaling larger or remaining the same. Once the CBA is understood, the WSMA can be applied to assess advantages and disadvantages of each option using a quantitative approach. Since freeze-dried candies are a new niche market segment, the case encourages discussion beyond just cost and features to other considerations such as the long-term outlook for the product, viability of the freeze-drying technology, risks associated with choosing each approach to creating a production facility, and the ability to keep up with ever-changing markets. LO-1: Apply and evaluate the SWOT analysis model to a side-hustle to evaluate strategic growth viability. LO-2: Apply and assess the CBA framework to a small business to determine the costs associated with growth or choosing to remain the same size. LO-3: Apply and analyze the WFSM to a production facility decision to prioritize criteria and evaluate the potential solutions. LO-4: Develop a final recommendation to solve the production facility selection problem, including an initial plan for first steps.

Case Synopsis

In early November of 2023, Pete O'Brien, his wife, and his son Lukas were trying to decide on the future of their Iowa-based home business that started two years earlier with Lukas' selling of freeze-dried candies at local farmer's markets. The journey started out as then 13-year old Lukas' side hustle making a few thousand dollars over six months into one that had grown into something that was on the verge of becoming a start-up business with over \$45,000 in retail sales. Under Iowa's Cottage Food Laws, the family could keep producing the treats out of their home and sell in retail locations but there was a \$50,000 cap. Once sales went beyond \$50,000, the family needed to produce the sweet snacks in a commercially licensed food production facility. They had to decide on whether to keep growing the business and if they did, what type of commercial facility would they pursue? Four options are presented: 1) Lease a current commercial building 2) Purchase a current commercial building 3) Build a new commercial building or 4) Lease space within an existing food production facility that was already certified by the state inspector.

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NEIGHBOURHOOD ENTREPRENEURSHIP: THE STORY OF THE FERNWOOD COLLECTIVE

William R. Holmes, Royal Roads University

Amy Zidulka, Royal Roads University

Case Objectives and Use

This case is suitable for senior level undergraduate courses in Entrepreneurship and Strategy. The case introduces the concept of entrepreneurial effectuation as it applies to the protagonist entrepreneur. The case also introduces stakeholder theory and illustrates the importance of stakeholder management in decision making with respect to major projects or material changes. The case addresses the social purpose of a neighbourhood venture in contributing to its local community, the relationship of the venture with its stakeholders and need for careful stakeholder management when making changes that impact them. Students will be introduced to the theory of effectuation, stakeholder theory, and corporate social purpose. Students will have the opportunity to develop skills in stakeholder analysis.

Case Synopsis

In early 2025, Mike Colwill, the Managing Director of the Fernwood Collective, a collection of several successful interconnected ventures located in the heart of the Fernwood neighborhood in Victoria, British Columbia, was faced with deciding between several options with respect to its future. The component businesses which made up the Fernwood Collective included the Fernwood Inn and Tavern, Fernwood Pizza, and the Fernwood General Store. Additionally, Fernwood Inn Investments held the titles to the properties on which these companies operated, serving as landlord to each of the businesses. The acquisitions of the adjacent properties that served as home to these ventures had culminated in the ownership of an acre of land right in the center of a vibrant and historical neighbourhood in the rapidly growing city of Victoria. While the component ventures were individually each going concerns, the assembled property was ripe for development. While recognizing that developing the property was probably the most economically profitable option, Colwill needed to decide whether he wanted to keep operating the businesses as per the status quo, develop the property while ensuring the businesses continued to operate in the new development, sell to property to a developer, or sell his stake in the Collective. Each of these options had both positive and negative outcomes attached to them, which were even further complicated by Colwill's emotional attachment to the businesses and his commitment to the Fernwood community. If he did decide to develop the property, he would have to carefully manage a broad spectrum of stakeholders with personal, financial, and emotional interests in the project.

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PITCHING AN IP-BASED NEW VENTURE

Jeff Moretz, Prairie View A&M University

Case Objectives and Use

This case has been designed for use in an undergraduate entrepreneurship course. Students are asked to explore entrepreneurial market entry strategies and apply lean startup and the Business Model Canvas (BMC). It has also been used in a social entrepreneurship course as part of a module on environmental sustainability and as an example for entrepreneurship discussions with engineering students, who find the exploration of market entry difficulty even with patent protection engaging. The case has been used both as a final check of individual ability to apply lean thinking and the BMC and as a background for step-by-step introduction of BMC elements across multiple course sessions. The case provides an opportunity to discuss market entry. Classes may use the case as background to guide students through the application of the Lean Startup approach to customer discovery & validation and introduction to pitching a venture.

Case Synopsis

In early 2024, Dale Moretz was revising a desktop prototype for his newest invention, a system (valve and method) for preventing oil pipeline leaks intended for use at sensitive water crossings. He had registered a company, Safe Crossings, LLC, back in 2015 to hold the new intellectual property. Dale had extensive entrepreneurial experience prior to launching this most recent venture, with nearly a dozen companies and three successful exits under his belt. He was also an experienced inventor with more than a dozen patents already issued. Although he had ample experience starting and running businesses and could apply those learnings to new ventures, he had no experience in the oil transportation industry. Safe Crossings was conceived after a catastrophic oil pipeline leak in western Michigan in 2010 that dumped an EPA estimated 1 million gallons of diluted bitumen (heavy crude oil), prompting a local evacuation and water quality warning. Dale was appalled at the environmental damage and set about developing a valve that relied on the flow of material in the pipeline itself and would not be incapacitated by power or connectivity loss. Dale's solution also leveraged a method of pumping the oil that created local negative pressure that facilitated valve operation while ensuring that any leak would draw water into the pipeline rather than leaking oil out into the environment.

The issue of pipeline safety had become much more significant with the dramatic increase in US and Canadian oil production. US production more than doubled and Canadian production had increased more than 40%. Pipeline construction was growing to meet that new demand for transportation of crude oil to US refineries, especially along the US Gulf Coast. The cost of pipeline oil spills could be enormous, with the Kalamazoo leak alone prompting \$200 million in fines and \$1.2 billion for clean-up. Protests against pipeline construction and operation were also on the rise, and construction delays could cost more than \$1 million per day. However, without pipelines oil would be transported by other, less efficient means, including oil tanker ships and oil trains, which disasters like the Exxon Valdez and the Lac-Mégantic oil train in Quebec showed were far from safe. Oil transportation economics strongly favored pipelines, so Dale needed to determine the most viable approaches given industry engineering and regulatory requirements. He expected the important patent to be issued soon, and he was completing some alterations to his design, but he needed to make some important decisions about the direction of his newest venture, including preparation for trade shows and for pitching his newest venture.

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**PLAETO:
THE “MULTIPLAY” DISRUPTION IN THE INDIAN ATHLETIC FOOTWEAR MARKET**

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Ram Subramanian, Professor of Leadership, Stetson University
Vijay Krishnamurthy, SDM Research Centre for Management Studies, University of Mysore

Case Objectives and Use

The case is intended for use in undergraduate and graduate courses in entrepreneurship, strategy and general management to illustrate start-ups’ ideation, positioning strategy, and strategic options to pursue a growth strategy. Additionally, the students will be able to understand the athletic footwear segment within the broader footwear industry including its market dynamics, consumer preferences, and competitive landscape. The case also makes a good fit for participants of short-term executive education programs that focus on start-ups.

Case Synopsis

In May 2025, Ravi Kallayil, - the co-founder and CEO of the Bengaluru, India-based athletic footwear startup, Plaeto and his team confronted a pivotal decision regarding business growth. Founded with a mission to supply shoes to the Indian school market by focusing on both foot health and aesthetics, the start-up with their ‘multiplay shoe’ offering had succeeded in making inroads against established giants such as Adidas and Nike. Serving the school market had its challenges and posed an enormous strain on their working capital. To overcome this, the start-up pivoted into the non-school market with a desire to establish a new category of ‘multiplay shoes’ in the competitive non-school market. Their positioning was driven by their unique differentiators—design and price points—with a mission to make footwear health both an important and affordable priority in the Indian market. They saw reversing the school/non-school split from the current 70/30 as the path forward for financial stability. Two venture capital firms were willing to fund the company’s growth but had scheduled an early June 2025 meeting for a persuasive pitch on the company’s plans for the non-school market. Kallayil had less than a month to work with the Plaeto team to develop a coherent strategy to make the non-school market transition profitable.

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PLAZA BEACH RESORTS: RESPONSIBLE REDEVELOPMENT

Jerry Zibrida, University of South Florida (student author)

Case Objectives and Use

This case is well-suited for graduate-level courses in Strategic Management, Entrepreneurship, Real Estate Development, and Hospitality Management. It is particularly relevant for MBA and DBA students analyzing stakeholder dynamics, urban policy, innovation in regulated markets, and family-owned business strategy. The case addresses issues such as strategic redevelopment, stakeholder conflict, regulatory barriers, disaster resilience, and civic engagement. Students will learn to evaluate strategic options in politically polarized environments, analyze opportunity costs, and assess how local politics and public sentiment shape private development outcomes.

Case Synopsis

In January 2025, Robert Czyszczon, Managing Partner of the family-owned Plaza Beach Resorts in St. Pete Beach, Florida, confronts a pivotal decision about the future of his boutique hotel group. Following back-to-back hurricanes that exposed the structural vulnerabilities of aging buildings, Robert envisions a resilient, dual-property redevelopment that aligns with the city's comprehensive plan. Yet, despite his properties' profitability and the alignment of plans with city policies, he faces a civic environment resistant to change, politicized zoning processes, and the threat of lawsuits—even when approvals are granted.

Plaza Beach Resorts operates in a market constrained by aging infrastructure, vocal retiree populations dominating civic discourse, and legal complexity. Robert and his wife, Mari, have expanded their holdings to include three boutique hotels and a strategic vacant parcel of land, now at the center of redevelopment ambitions. As community backlash intensifies over perceived encroachment on local park space, Robert must weigh several tactical paths forward: fortifying the business until political tides shift, pushing forward with a redevelopment plan, dividing projects to confuse opposition, or offering part of the land as a public gift.

This case challenges students to consider how family-owned businesses navigate strategic decision-making amid regulatory rigidity, community resistance, and climate-driven urgency. It also invites critical analysis of how political structures and resident participation distort policy outcomes—raising broader questions about representative governance and sustainable tourism development.

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 2025 Conference, Newport Beach, California, USA, October 16–18, 2025. © 2025 by Jerry Zibrida. Contact person: Jerry Zibrida, University of South Florida, 140 7th Ave S, St. Petersburg, FL 33701, jzibrida@usf.edu

PURPOSE MEETS PROFIT: EXIMUS EDUCATION'S STRATEGIC ENTRY INTO WHOLESALE TUTORING

Sadaf Taimoor, University of Calgary

Rajan Shah, Amity University

Mohsin Adhi, triOS College, Toronto

Case Objectives and Use

This case offers a bird's-eye view of the challenges faced by emerging social enterprises as they strive to balance financial sustainability with meaningful social impact. Designed for undergraduate and graduate students in entrepreneurship, strategy, and marketing courses, the case enables learners to explore how macro-environmental factors influence entrepreneurial ventures. It also provides a practical understanding of key theoretical frameworks, such as bricolage theory and blue ocean strategy, to equip students with the foundational tools for launching and strategically positioning ventures for long-term success.

Case Synopsis

Set in the winter of 2024, this case study explores a strategic dilemma faced by Haris Jawaid (Jawaid), founder of Eximus Education, a UK-based social enterprise that has made notable progress in the country's education sector. Founded in 2018, Eximus aimed to address pressing challenges in education by leveraging technology and offering a market-competitive pricing model to students looking for tutoring services in the UK. While the enterprise experienced rapid early growth, intensifying competition left Jawaid wondering about how he could scale the venture without compromising its core mission of delivering equitable, high-quality education?

Against this backdrop, the case provides insight into the complex decisions Jawaid had to navigate as he attempted to balance purpose-driven values with the realities of a competitive, profit-oriented market. It invites students to critically evaluate the strategic trade-offs inherent in social entrepreneurship.

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 2025 Conference, Newport Beach, California, USA, October 16-18, 2025. © 2025 by Sadaf Taimoor, Rajan Shah & Mohsin Adhi. Contact person: Sadaf Taimoor, University of Calgary, Sadaf_z3@hotmail.com

**ROOTED IN OPPORTUNITY:
EVALUATING A HIGH-STAKES DECISION FOR A BUDDING ENTREPRENEUR**

Cheryl Mitteness, Northeastern University

Case Objectives and Use

This case is designed for undergraduate and MBA-level courses in Entrepreneurship, Entrepreneurial Marketing, New Venture Planning, or Strategic Decision-Making. It fits well in the early-to-middle stages of the course when students are exploring how entrepreneurs evaluate growth opportunities, weigh risks, and align decisions with core values.

Case Synopsis

In February 2025, Rachel Domb, the 24-year-old founder of Rooted Living, a Boston-based startup producing plant-based granola packaged in compostable materials, faced a pivotal entrepreneurial decision. Rachel received an invitation to participate in an entrepreneurial reality competition show airing on Amazon Prime, offering national exposure, intensive mentorship, and a potential \$100,000 prize. Rooted Living was founded in 2020 while Rachel was earning her undergraduate degree. Fueled by her frustration with unhealthy snacks and unsustainable packaging, Rachel solved this problem for herself and soon became inspired to help others seeking similar healthy, environmentally responsible options. The startup's granola products gained traction online and with retailers. By early 2025, Rachel's venture was at a critical juncture—successful yet resource-constrained.

The competition presented significant strategic benefits, including increased brand visibility, invaluable mentorship, and substantial funding. However, the opportunity required relocating to California for two months, imposing operational and financial burdens. Rachel would need to remotely manage Rooted Living's operations, risking disruptions to customer service and ongoing business development initiatives, including critical fundraising efforts.

Rachel's decision involved weighing the substantial potential gains against tangible and intangible risks such as business disruption, personal financial strain, and emotional pressure. Her challenge exemplifies entrepreneurial decision-making under uncertainty, as well as balancing strategic growth opportunities against practical constraints.

This case invites readers to critically evaluate strategic risks, risk management, alternative growth paths, resilience, and decision-making frameworks essential to entrepreneurial success.

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SANKOFA: A HEALTH AND WELLNESS ODYSSEY INTO THE HEART OF OCEANS

Imhotep Paul Alagidede, University of the Witwatersrand, Wits Business School
 Immaculate Simiso Nxumalo, University of the Witwatersrand, Wits Business School

Case Objectives and Use

This case study explores Heart of Oceans Industries Limited (HOC), a Ghanaian beverage startup, as it navigates regional expansion in West Africa. Founded in the early 2000s, HOC evolved from a local enterprise to a national leader and now targets subregional markets. Designed for master's-level courses (e.g., MBA, MSc in Management), the case spans finance, strategy, marketing, and entrepreneurship, focusing on financing choices, scaling ventures, branding, and African market dynamics. It underscores the integration of business disciplines, illustrates strategies for success in emerging markets, and offers a framework to analyze the growth challenges and opportunities of indigenous startups.

Case Synopsis

It was April 2024, and Heart of Oceans Industries stood at a crossroads. In the company's boardroom in Techiman, CEO Douglas Kwoyigah and Production Manager Jonas Abaching Asorrow weighed a pivotal decision – how to expand their signature tamarind and baobab natural fruit juice beyond Ghana's borders. For over a decade, their brand had built a loyal following locally, capitalising on the rising demand for organic, nutrient-rich beverages. Now, the vast West African market with its 460 million potential consumers, beckoned.

Yet, the path to regional expansion was fraught with challenges. How would a start-up enterprise compete against multinational beverage giants with deep pockets and established distribution networks? Could they successfully navigate the complexities of cross-border trade, from regulatory hurdles to supply chain logistics? More importantly, how could they position their Africa-centric product to capture a market increasingly drawn to the promise of natural-based living? Would invoking the spirit of *Sankofa* — reconnecting consumers with the health benefits of Africa's pristine superfoods—be enough to set them apart?

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SCALING WOO GIRL WEEKEND WEAR

Brian G. Nagy, Tennessee State University
Steven W. Day, North Carolina Central University

Case Objectives and Use

Scaling Woo Girl Weekend Wear represents a compelling case of entrepreneurial insight, brand positioning, and growth dilemma in a niche apparel market. Sonja Musterman's journey reflects both the opportunities and trade-offs involved in scaling a brand that is as much about the moment as it is about the merchandise. This case allows students to consider and work with several important entrepreneurial and strategic management concepts including, but not limited to, digital marketing methods, the Resource-Based View of the firm, market entry tactics, differentiation strategies, and gauging the voice of the customer.

Case Synopsis

Founded in early 2024 by serial entrepreneur Sonja Musterman, Woo Girl Weekend Wear emerged as a vibrant brand targeting women celebrating personal milestones such as bachelorette parties, birthdays, and reunions. Originating from an idea effected and contemplated during a girls' trip to Nashville, Tennessee, Woo Girl Weekend Wear has capitalized on the unique, playful atmosphere that defines popular party destinations. With fun, slogan-emblazoned apparel and a growing physical presence in Nashville, as well as Myrtle Beach, South Carolina, Sonja quickly began to realize significant sales during sales efforts occurring during weekends. She now faces a critical juncture related to how to scale the brand in a sustainable, differentiated, and profitable way while considering the following options:

- Optimizing the Woo Girl Weekend brand by using an online platform to enhance post-event sales seemed possible. Rather than relying on e-commerce for customer acquisition, use it to enable group ordering, post-event keepsakes, and custom re-orders. This investment in the e-commerce arena could be supported using follow-up email campaigns tied to event dates.
- Moving beyond just trendy T-shirts may be another option for differentiation and growth. The novelty of these spontaneous purchases, made by customers in an excited state, would wear off quickly. Customers may be interested in more than just another T-shirt or tank top with a catchy phrase on it. Options included tote bags, hats, phone lanyards, and reusable glitter cups.
- Capitalizing on market opportunities potentially present in Austin, Texas, and replicating this business model seemed possible. Opportunities to expand selectively in similarly high-potential cities (e.g., Scottsdale, Arizona, Charleston, South Carolina) through local partnerships may exist. Testing a micro-franchising model with rigorous brand control measures could be another option for growth in sales.

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THE BLUE FLAME: SELL OUT OR HOLD OUT?

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Judith Finch Hooper, President, Home Services

Case Objectives and Use

The case learning objectives are:

1. Development of an understanding of the dilemma confronting a minority owner in a family firm faces when trying to decide whether to withdraw or continue with the business.
2. Evaluation of the three original owners' preparation for undertaking the business.
3. Assessment of the business model and its sustainability.
4. Valuation of the business.
5. Identification and evaluation of potential exit strategies.

The case is appropriate for undergraduate and graduate courses in:

1. Small Business Management, and
2. Entrepreneurship.

Topics Covered: Business model and its sustainability; Business Valuation; Exit Strategies

Case Synopsis

This case developed from field research and archival data focuses on Harry Finch's dilemma of whether to approach the majority owner of the firm, his brother-in-law Dwight Levere, about buying him out of the company or not. Harry was a minority owner of the Blue Flame (Border Bottled Gas & Fuel Company Ltd.) and owned 40% of the six-year-old company while his brother-in-law Dwight owned 60%. The case provides the history of the company, description of the market the company served, the business, technology (propane versus natural gas), company financials, and the backgrounds of the two owners.

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THE LOCAL BUTHCER: KEEPING TRADITIONS ALIVE

Danya Marhamo, USF Muma College of Business (student author)
Mathew Mullarkey, USF Muma College of Business (faculty supervisor)

Case Objectives and Use

This case is suitable for capstone undergraduate business majors and MBA courses in Entrepreneurship, Strategic and Family Business Management, and Small Business Strategy. It fits within the course modules on business succession, community-focused businesses, and the challenges of traditional business models in a modern competitive landscape. The issues addressed in this case are client acquisition and retention, financial constraints, technological advancements, changing global trade landscapes, and succession planning and retirement. The aforementioned challenges faced in this case can be applied to other local “maw and paw” businesses (liquor stores, grocery marts, restaurants etc.). Students will develop small business skills to think critically, see a business as a whole, and consider several business factors simultaneously “wearing all the hats” in a business.

Case Synopsis

On the morning of Eid al-Adha 2024, after Eid Prayer, on his drive from the New Hampshire Halal Meat Slaughter House, Salim Marhamo reflected as he would spend the next four days serving his community and ensuring all Muslim families had Qurbani/Udhiyah. as he has done for the past 35 years. Year over year this key holiday was the driving factor of success for Quincy International Food Co., a Halal middle eastern butchery and grocery store. After 35 years he continued to work 15 hour days and was not able to hire a full-time manager to take over the major duties of the business or spend the holiday with his family. He was getting older, and the long days and hard work were taking a toll on his body.

Marhamo’s deepest desire was to have a fully operational business with only limited oversight and involvement on his part. If he was unsuccessful in this venture, he would settle on renting his storefront as this would generate a reasonable cashflow for his retirement as well, with limited involvement. “Should I keep investing in the business, sell, or rent the space?” he thought to himself.

Marhamo’s decision of whether or not to proceed was influenced by a number of issues. First, there was the question of whether he could find trustworthy and skilled employees. Their customer base also tended to be different—culturally, they bargained for the lowest deals around and were not loyal to any one butcher or grocery shop. This came as a significant disadvantage when local competition increased. Fear of losing market share kept sales prices unchanged while inventory costs increased due to tariffs and inflation. Furthermore, Marhamo is an old-fashioned businessman who has faced challenges implementing new technology and modern-day marketing into the business. For this reason—unlike their international grocery store competitors—the business saw a steady decline in new customers.

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THE REAL STATE OF REAL ESTATE: IDENTIFYING TARGET CUSTOMERS OF HOME BUYERS, WHAT STRATEGY SHOULD MELVIN INDIA INFRA PRIVATE LIMITED USE?

Punyaslok Dhall, Xavier Institute of Management

Case Objectives and Use

This case was developed ideally to be discussed in the undergraduate level for Business Strategy. The case works well in courses on strategic marketing or entrepreneurship. It also works well with executives specializing in project management.

The objectives are:

- To acquaint the students to the real estate eco system and how external regulatory changes affect the business scenario
- To correlate to the theories involving customer decision making process for high involvement products and how the entrepreneur would formulate his/her target segment and positioning

Case Synopsis

This case is based on the actual events, describes a situation facing the protagonist Bibhu at Melvin India Infra Private Limited a real estate company established in 2002, focused on civil constructions (both government and private sectors) on turnkey basis. Bibhu along with three of his partners started undertaking civil contracts from the government and subsequently ventured into fast growing housing sector. The housing sector was quite lucrative because of high demands, high margin and poor regulatory framework. Subsequently, the quasi-judicial regulatory body was created to monitor the system and processes and to protect the interest of the customers. The case has two major dimensions. The first one relates to the changing regulatory requirements and how Melvin India Infra Private Limited needs to reorient its business strategy and business processes. The second dimension is to identify the correct market segment for the projects Bibhu is undertaking by analyzing the customer decision making cycle for high value and high involvement products.

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VOCAL EASE

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

Case Objectives and Use

This case would provide a foundation for undergraduate business students or MBA students in the principles of entrepreneurship, including identifying opportunities, developing minimal viable products, business planning, break even analysis, and pivoting. From a marketing perspective, this case would explore topics such as market research, branding, and advertising. Specific learning objectives include opportunity recognition, market research and analysis, minimum viable product, breakeven analysis, business model innovation, marketing strategy development and resilience and adaptability.

Case Synopsis

They say that necessity is the mother of invention, and Elizabeth Bennett came to personify this piece of practical wisdom during the early part of the Covid-19 pandemic. As a professor of vocal performance, Elizabeth found that mask mandates impeded her ability to effectively teach proper singing techniques. So, with an entrepreneurial spirit, she invented VocalEase—a sonically transparent facemask that provided protection from Covid while allowing vocal melodies to flow through with remarkable clarity. Although there was initially a robust market for the product, the twists and turns of the pandemic resulted in a surplus of VocalEase masks sitting in a warehouse, seemingly unsellable. Now, Elizabeth was at a crossroads with some challenging questions on her mind: Could she find a new market? Could she afford to continue storing the masks? Should she consider selling the VocalEase brand?

Taking the next steps in her entrepreneurial journey would require Elizabeth to tap into the kind of discernment, optimism, and problem solving that she had so effectively taught her vocal students throughout her academic career.

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MARKETING CASES AND INTERNATIONAL BUSINESS CASES

Track Chair: Silvia Cacho-Elizondo, IPADE Business School (Marketing) and

Track Chair: Grishma Shah, Manhattan University (International Business)

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

Cases	Authors
Berel: Beyond Color	Pablo A. Zubieta Antonio Casanueva
Brands & People: Reinvention of a Creative Agency in the New Era of AI	Silvia Cacho-Elizondo
Bykea at Crossroads: Bikes or Cars?	Farah Baig Tashfeen Khan Ealaf Saeed Aitezaz Hussain Hifzah Roshan
Canada-US Trade Relations: From Reciprocity to USMCA and Back?	Igor M. Paramonov
Cemex Tavo: Developing Consultative Selling Through Artificial Intelligence	Miguel De La Colina Rincón Carlos Castellanos Rodríguez
Donum: Preparing to be a Global Luxury Brand	Michael M. Goldman InHaeng Jung Magalie Dubois
Expanding Impact in Nigeria: A Nonprofit's Fundraising Challenge	Claudia Barrulas Yefremian
Keeping It Rielli: Finding the Right Fit with Influencer Marketing	Denise Gravatt Loran Jarrett
Mex: The Power of a Brand as Competitive Advantage for a Family Business	Mario Rolando Paredes Escobar Antonio Casanueva Fernández
Natakallam: Learn a Language, Change a Life	Martha Rivera-Pesquera Rafael Duran Dergal
Redtech Software Development in Australia	Robert Galvin
Scaling Markaz: Growth at What Cost?	Farah Baig
Scroll, Hook, Repeat: Kuku TV's Strategy for Microdrama	Deval Kartik
The Light and Shadow of Brand Community in Marketing: NIO and Its "Shareholders"	Bingxin Leng Qimei Chen
To Move, or Not to Move? That is the Decision	Jasmin Lin Daisy Wang

BEREL: BEYOND COLOR

Pablo A. Zubieta, IPADE Business School
 Antonio Casanueva, IPADE Business School
 Silvia Cacho-Elizondo, IPADE Business School (faculty supervisor)

Case Objectives and Use

This case is designed for use in MBA, Executive MBA, and other postgraduate business programmes, particularly within modules focusing on strategic marketing, brand management, customer experience, and integrated communications. It is also well-suited for executive education and specialised seminars addressing the strategic transformation of functional or commoditised brands.

The case enables students to develop a strategic understanding of how to design and sustain differentiated value propositions in markets where products are commonly perceived as interchangeable. It fosters competencies in strategic diagnosis, systems thinking, brand positioning, and customer-centric marketing. Through engagement with the case, participants are invited to examine the construction of emotional brand narratives within functional categories, evaluate the alignment between brand promise and commercial execution, and critically reflect on the role of purpose-driven marketing in achieving competitive advantage in complex social and organisational contexts. Particular emphasis is placed on the dynamics of family-owned enterprises navigating tensions between tradition, professionalisation, and global competition.

Case Synopsis

In April 2025, in the lead-up to the Annual Strategy Meeting of the Board of Directors of Pinturas Berel, the company's leadership is reassessing its strategic marketing direction. Pinturas Berel, a family-owned paint manufacturer based in Mexico, operates within a highly functional and commoditised industry. Nonetheless, it has established a strong national brand by cultivating emotional resonance with consumers through initiatives such as the "No puedo ver" (*I cannot see*) campaign and environmentally oriented innovations like the *Berelex Green* product line.

Amid increasing competitive pressure from global brands, shifting consumer expectations, and internal demands for innovation and professionalisation, the company faces critical strategic choices. The case situates participants at a pivotal moment, requiring them to analyse the coherence between brand purpose, market execution, and consumer perception. It invites critical reflection on how a functional brand can maintain relevance, authenticity, and competitive differentiation in a dynamic, emotionally complex, and socially demanding environment.

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BRANDS&PEOPLE: REINVENTION OF A CREATIVE AGENCY IN THE NEW ERA OF AI

Silvia Cacho-Elizondo, IPADE Business School

Case Objectives and Use

This case invites participants to critically reflect on how creative agencies can evolve into purpose-driven consultancies without losing their identity. It explores how organizations can build emotionally resonant “cool brands” while designing scalable, AI-integrated business models.

Upon completion of the case discussion, students should be able to:

- **Evaluate** the strategic construction of brand coolness (Warren et al., 2019) and its role in differentiating creative value propositions in saturated markets.
- **Design** a five-year strategic and commercial roadmap that reconciles innovation, scalability, and the emotional essence of a creative brand.
- **Assess** the affordances and limitations of AI in augmenting creative processes, team workflows, and brand storytelling (Leonardi, 2011; Kaplan & Haenlein, 2019).
- **Apply** frameworks from organizational ambidexterity and purpose-driven strategy and branding (Tushman & O'Reilly, 1996; Keller & Richey, 2006; Aaker, 2022) to craft a hybrid model of business and creativity.

Case Synopsis

On January 9, 2025, Gerardo and Carlos, co-founders of Brands&People (B&P), gathered at their Monterrey headquarters to reflect on the agency's future. For more than two decades, B&P had crafted emotionally resonant and culturally bold campaigns, evolving into a brand consultancy partnering with some of Latin America's most iconic companies. Rooted in simplicity, empathy, and beauty, these values defined every project and client relationship. However, the creative industry was undergoing radical disruption. Generative AI tools such as ChatGPT, Midjourney, and Adobe Firefly were reshaping the way brands communicated, created, and connected. While these tools offered unprecedented capabilities, they also posed deep existential questions:

Would creativity become commoditized? Could human authenticity survive algorithmic acceleration?

B&P had recently launched its boldest transformation yet: a moonshot known as '3X3DW'—a commitment to triple revenues while transitioning to a three-day workweek. As the team pushed forward, Gerardo and Carlos faced a strategic and philosophical dilemma:

How could B&P evolve into a scalable consultancy model without compromising its creative essence?

Could AI become a multiplier of human imagination, or would it dilute the agency's soul?

This case invites students to examine the tension between growth and identity, and between algorithmic intelligence and human intuition. The protagonists must assess the leadership team's proposals and design a five-year strategic plan capable of realizing the 3X3DW vision. The solution cannot focus solely on efficiency or profitability—it must embody the firm's core values of simplicity, empathy, and beauty. As the finance lead, strategist, CTO, and creative director prepare to present their perspectives, students are challenged to imagine: ***What should a creative company look like in the age of artificial intelligence? and also, how can it remain radically human?***

Keywords: Brand Coolness, Creative Agency, Artificial Intelligence (AI), Hybrid Transformation, Organizational Ambidexterity, Strategic Roadmap.

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BYKEA AT CROSSROADS: BIKES OR CARS?

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 Aitezaz Hussain, IBA, Karachi (student author)
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Case Objectives and Use

This case is intended for elective courses such as Marketing Management, Entrepreneurial Marketing courses, Marketing for Startups and Brand Management at the undergraduate and graduate-level students. This case can be taught in a 75-minute class. The case explores how startups evolve as their businesses grow, emphasizing the importance of growth to meet the expectations of venture capitalists and investors. It facilitates a discussion around the strategic decisions entrepreneurs must make to drive growth, including how they identify attractive market segments and the key factors they consider when scaling their ventures.

Case Synopsis

Rafiq Malik, founding member and chief operating officer (COO) of Bykea stared at the rush-hour gridlock on Karachi's Shahrah-e-Faisal, the horns outside echoing his own debate. In June 2022, Bykea had just closed a US \$10 million regional VC round, yet celebration was on hold; should the company stay laser-focused on motorbikes or divert cash to a car-hailing play? Since COVID-19, daily bike rides had topped 65,000 in Karachi, proving the model cheap and resilient. But growth was flattening; analysts valued Pakistan's ride hailing market at \$277 million in 2022, on track for \$375 million by 2029, growth largely sitting in cars, where Careem and Uber now face an aggressive newcomer, In Drive. The management team saw two ways to spend the capital raised from the recently raised \$10 million Series B funding: Expand the Bykea motorbike's untapped cities and deepen share in Lahore and Rawalpindi or Launch cars which was a higher-value segment under the Bykea brand or perhaps a separate sub-brand and pick the launch city (Karachi, Lahore, or Islamabad/Rawalpindi) for the car launch. Which option delivered the biggest bang for the buck without eroding Bykea's image as the affordable mobility choice for Pakistan's working and middle class? That was the decision that they had to make and present before the next board meeting the next week.

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CANADA-US TRADE RELATIONS: FROM RECIPROCITY TO USMCA AND BACK?

Igor Paramonov, Southern Alberta Institute of Technology

Case Objectives

This case engages students in a critical analysis of complex issues in international commerce and trade policies, including protectionism and economic integration. The objectives are:

- Apply retrospective analysis of Canada-US trade relations to identify recurring issues and resolutions.
- Examine the motivation behind nations engaging in international trade and assess the role of government. Distinguish and compare various forms of trade policies.
- Compare and evaluate the pros and cons of bilateral and plurilateral trading agreements.
- Recommend the most reasonable terms and practices for trade relations between Canada and the United States, and prove their validity.

The case is intended for the International Trade Policies and Regional Economic Integration modules of the International Business course at the undergraduate level. This case could also be taught in International Economics and Public Policy courses. The case is also recommended for professional designation programs, including the Forum for International Trade Training (FITT) and supply chain management certification. While preparing and discussing this case, learners will be engaged in a thought-provoking learning experience. They will gain the capacity to analyze and participate in problem-solving and the evidence-based policymaking process.

Case Synopsis

This analytical case examines the evolution and prospects of trade relations between Canada and the United States. The historical process linking the national economies through the Reciprocity to reduce trade barriers and gradually form a plurilateral free trade and economic integration agreement took place over the last two hundred years.

The case discusses the history of bilateral trade relations between Canada and the US, progressing from commercial bargaining in the 19th century to continental trade that has fostered the creation of integrated cross-border value chains. The first reciprocal agreements were short-lived, being interrupted by the protectionism from both sides, but paved the way to free trade and investment agreements of the 20th century.

The first agreement, NAFTA, resulted in the largest free trade area in the world, although with asymmetrical economic relations and Canada's overdependence on the US. The cross-border value chains gradually outgrew the institutional framework established by NAFTA. New realities of the 21st century made NAFTA incomplete and outdated. The new deal, USMCA, preserved key elements of the long-lasting trading relationship and incorporated new provisions.

The final section discusses the implications of the 'America First' trade policy for Canada-US trade relations. Trump's Administration imposed unreasonably high tariffs on Canadian and Mexican-made products. American tariffs against its major trading partners have raised questions about the validity of the USMCA and the ways to end the trade war in North America. The choice to normalize trade relations between Canada and the United States will be between the old-school reciprocity based on bilateral negotiations and trilateral updates to the USMCA.

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 2025 Conference, Newport Beach, California, USA, October 16 - 18, 2025. © 2025 by Igor Paramonov. Contact person: Igor Paramonov, SAIT School of Business, 1301 – 16 Ave. NW, Calgary, AB T2M 0L4, Canada, 403-284-7357, igor.paramonov@sait.ca

**CEMEX TAVO:
DEVELOPING CONSULTATIVE SELLING THROUGH ARTIFICIAL INTELLIGENCE**

Carlos Castellanos Rodríguez, IPADE Business School
Miguel de la Colina Rincón, IPADE Business School
Silvia Cacho-Elizondo, IPADE Business School (faculty supervisor)

Case Objectives and Use

This case is suitable for courses in strategic management, marketing, digital transformation, or innovation management at the MBA or executive MBA level, as well as for executive programs. It is especially useful in discussions related to customer-centric strategies, sustainability, digital ecosystems, and the integration of data strategy and artificial intelligence for the evolution of the sales processes. The case addresses critical issues such as an organizational digital transformation, consultative sales evolution, sustainable product positioning, and the challenges of deploying Data and AI tools like virtual assistants within global sales ecosystems. Students will discover how a traditional business in a mature sector can revamp its commercial strategy developing data, technology and sustainability strategies.

Case Synopsis

In January 2024, Manuel Toro, the Global Head of Commercial Development at Cemex, was assessing the prospects and hurdles ensuing the introduction of Olivia TAVO, a Generative Artificial Intelligence - driven virtual assistant aimed at facilitating consultative sales of eco-friendly construction products. As a worldwide leader in the construction materials sector, Cemex had already initiated a digital transformation journey with the rollout of *Cemex Go* back in 2017.

The company's evolution included a strategic commitment to sustainability, comprising the launch of the Vertua® product line, and a redefinition of the roles of the salesforce, from transactional order-taking to consultative partnerships. Cemex TAVO, developed using generative AI, provides sales teams with technical product data, regulatory information, and sales guidance. The case explores the integration of a data strategy, training through Cemex University, and AI tools to transform global sales operations, while questioning how to maintain human connection, evolve KPIs, and scale innovation globally.

This transformation had required substantial organizational changes, including enhancing the skills of over 2,000 sales personnel and redefining commercial functions to align with Cemex's sustainability objectives. The case also emphasizes the company's grassroots innovation framework, wherein concepts generated in local markets undergo testing, validation, and scaling via global collaboration. Cemex TAVO is one such innovation, initially devised in Mexico and geared for worldwide deployment. The case encourages students to reflect on the strategic ramifications of digital tools in multifaceted B2B settings and how AI can augment, rather than supplant, human proficiency in customer engagements.

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DONUM: PREPARING TO BE A GLOBAL BRAND

Michael M. Goldman, University of San Francisco
InHaeng Jung, School of Business, Sonoma State University
Magalie Dubois, Université Bourgogne Europe

Case Objectives and Use

The case is appropriate for upper-division undergraduate and graduate courses related to marketing and branding, especially demand generation for luxury brands and wine brands. The case addresses critical issues surrounding experiential marketing, brand growth strategies for luxury goods, and the unique challenge of communicating immersive in-person brand value to remote and digital audiences. Students will develop skills in analyzing a brand's experiential marketing across sensory, affective, behavioral, and intellectual dimensions. They will also gain insights into evaluating major growth strategies pertinent to luxury brands and learn to develop effective communication methods for conveying a brand's unique experiential value in a global, digitally-driven market.

Synopsis

In May 2025, Angelica de Vere-Mabray, CEO of The Donum Estate, a distinctive Sonoma-based luxury wine producer, celebrated for its integration of its world-renowned collection of fine art, faced a critical strategic challenge: how to effectively communicate this unique multi-sensory journey to potential global wine customers and support the Estate's ambitious growth objectives. The core dilemma lies in developing innovative methods to convey Donum's profound "sense of place" and the richness of its in-person experience to a remote and digital audience. The Estate is well-positioned, marked by consistent year-over-year revenue growth. Donum's uniqueness stems from its world-renowned Donum Collection of art, a singular asset seamlessly integrated into the landscape, and its Regenerative Organic Certified® (ROC™) status across all vineyards. These elements, combined with hospitality characterized by an exceptional attention to detail form the core of Donum's highly distinctive, immersive visitor experience. The recent acquisition of the 52-acre Savoy Vineyard further strengthens its production, offering rich context for evaluating luxury brand growth strategies. However, pursuing global growth occurs amidst market challenges. While the luxury wine segment where Donum operates, continues to demonstrate national growth, the broader decline in Direct-to-Consumer (DtC) shipment volumes, indicates a challenging overall industry context. Critically, managing an increased production of approximately 13,500 cases by May 2025 amidst these market conditions presents a distinct challenge, requiring careful navigation to preserve brand exclusivity and secure broader distribution. The primary hurdle remains translating the experiential and sensory brand value to audiences unable to visit, requiring analysis of experiential marketing across sensory, affective, behavioral, and intellectual dimensions. The case provides a comprehensive overview of The Donum Estate's history, operations, and the owners' vision. It details viticultural practices, and analyzes the broader U.S. wine market, covering production, sales models, key trends, and specific data on luxury wine and DtC shipments.

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EXPANDING IMPACT IN NIGERIA: A NONPROFIT'S FUNDRAISING CHALLENGE

Claudia Barrulas Yefremian, California State University Long Beach

Case Objectives and Use

This short case (4 pages) was written for undergraduate-level international business and nonprofit management courses. The case invites students to examine a nonprofit organization based in Nigeria, Africa, seeking to raise funds internationally to support their domestic expansion plans. Students are asked to conduct industry and competitive analyses, apply IB strategy frameworks for market selection and entry mode analyses, and conduct cross-cultural analysis to help the organization develop an international fundraising strategy. As part of the case analysis, students are asked to (1) identify one international market that offers the best opportunity for the organization to raise funds, (2) compare different donor types (diaspora, foundation, corporate), and choose the best fit, (3) explain the risks and benefits of a hybrid organizational structure to potential international nonprofit donors, and (4) create a fundraising message and campaign plan that is culturally relevant in the selected country.

As a result of preparing and discussing this case, students will develop critical and strategic thinking skills related to scaling social ventures in emerging markets. The students are asked to apply tools such as SWOT, PESTEL, and CAGE to assess growth opportunities, evaluate solutions, and explore how to balance social impact with operational scale. Through this process, students will also gain experience in stakeholder mapping, partnership strategy, and designing culturally relevant messaging that aligns with both local needs and global donor expectations.

Case Synopsis

In Lagos, Nigeria, KEY academy, short for Keep Educating Yourself, pioneered a bold reimagining of education in Africa. Founded in 2019 by Damilola Okonkwo, a finance executive turned education innovator, the organization aimed to disrupt traditional schooling with an approach built on project-based learning, or learning by doing. KEY's vision was rooted in local realities while oriented toward global standards. In a short period, KEY gained recognition from local stakeholders as one of the most forward-thinking educational institutions in the country. By 2025, KEY academy stood at a critical inflection point. After laying a strong foundation, KEY's next milestone was to expand its educational services to include secondary education and launch its HQ campus in 2027. Completing this project required substantial funds, and KEY's management team was considering fundraising internationally. The organization was evaluating what would be the best use of its resources, which country it should target, and how it could design an effective international fundraising strategy.

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KEEPING IT RIELLI: FINDING THE RIGHT FIT WITH INFLUENCER MARKETING

Denise Hunter Gravatt, Florida Atlantic University
Loran Jarrett, University of South Florida

Case Objectives and Use

This case is designed primarily for advanced undergraduate or MBA-level courses in digital marketing, influencer marketing, or social media strategy. It may also be used effectively in entrepreneurship courses at either level, especially those focusing on branding, resource allocation, and decision-making under constraints.

The case addresses real-world digital marketing decisions, including influencer selection, budget limitations, brand alignment, and campaign strategy in a competitive industry. Students will evaluate data such as engagement rates, follower demographics, and influencer authenticity, while also considering how marketing decisions shape and extend a company's brand culture. In preparing and discussing this case, students will develop critical thinking and decision-making skills in digital marketing contexts, strengthen ability to connect brand culture and values and execute tactical marketing strategies, build practical insights and applications for careers in digital marketing, social media management, or entrepreneurial pursuits.

Case Synopsis

In June 2025, just shortly after being a featured brand at Miami Swim Week, Arielle Baril, founder of Rielli luxury swimwear, twenty-six-year-old entrepreneur, and 2023 Forbes 20 Under 30 Miami recipient, must determine which social media influencers she will work with to promote her brand. Having hit the influencer jackpot in the first year of founding her company when she randomly sent samples to celebrity influencer Kim Kardashian, who then ordered one in every color for her 40th birthday in 2020. Rielli became a globally recognized luxury swimwear brand overnight, featured in high-fashion magazines and securing the coveted Sports Illustrated Swimsuit spot four times in the past five years. Despite having incredible success, in the competitive fashion industry, Arielle cannot idly rest on her past accomplishments or promotions. She understands how important influencer marketing is for continuing to promote her brand; she also wants to be strategic in her selection to ensure the influencers she works with have similar values of authenticity as well as have favorable metrics (from followers to engagement rates and audience analytics) and align with her target audience. As a small business owner, she is also limited in both time and budget. With a few Spring/Summer 2025 designs to gift for promotion so she can move product in time for the Fall/Winter launch, she pared down the list of the influencers she met during Miami Swim Week and at the cocktail hour Rielli sponsored. Now, she has to make a decision about what combination of two out of the six micro and macro influencers on her list will be the best fit for her brand.

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MEX: THE POWER OF A BRAND AS COMPETITIVE ADVANTAGE FOR A FAMILY BUSINESS

Antonio Casanueva Fernández, IPADE Business School
Mario Rolando Paredes Escobar, IPADE Business School
Silvia Cacho-Elizondo (faculty supervisor), IPADE Business School

Case Objectives and Use

This case is designed to help students and executives analyze how a family-owned company can leverage brand identity and cultural symbolism as strategic sources of differentiation in a commoditized, globalized industry. It fosters discussion on the intersection between brand management, family governance, and strategic growth. Participants evaluate how Mex Rent a Car, a Mexican family business operating in the car rental sector, balances emotional and symbolic capital with operational efficiency as it transitions to second-generation leadership and international expansion.

The case is suitable for MBA and executive courses in Strategic Marketing, Brand Management, and Family Business Strategy, particularly within modules on competitive positioning, customer experience, and cultural branding. It can also be used to explore how governance mechanisms (Board of Directors, Family Council) support professionalization while preserving founder values and organizational culture.

Case Synopsis

This case explores the evolution of Mex Rent a Car, a Mexican family-owned business founded by Javier García Ramírez. The company transitioned from being a sub-franchisee of Fox to developing its own national brand identity, rooted in family values and a strong focus on customer experience. Under the leadership of the second generation, headed by Javier García Jr., Mex consolidated its presence in Mexico and began its international expansion.

In an industry dominated by global giants such as Hertz, Enterprise, and Avis, Mex pursued a differentiated strategy: transparency in service, commercial disintermediation, direct digital marketing, and a brand narrative centered on Mexican identity. This approach enabled the company to build trust-based relationships with both domestic and international customers, while also presenting operational and strategic challenges as it scaled in more demanding markets.

The central dilemma arises at the intersection of generational transition and international growth: how can Mex evolve into a global enterprise without losing its soul as a family business? What role does branding play in this evolution? The tension between operational efficiency and fidelity to family values permeates the discussion, opening the door to analysis around brand strategy, organizational culture, and family governance.

The case ultimately invites reflection on how symbolic and cultural branding can serve as a strategic lever for family-owned firms facing the dual challenge of legacy and growth.

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NATAKALLAM: LEARN A LANGUAGE, CHANGE A LIFE

Martha Rivera-Pesquera, IPADE

Rafael Durán Dergal, IPADE

Case Objectives and Use

This case is suitable for use in second-year MBA marketing courses or in elective courses on digital marketing, digital transformation, new business models, or marketing for entrepreneurs.

Given the strategic focus of the case, it also works well in Executive Education Programs and is useful for explaining new concepts and business models in the digital era.

The academic objectives of the case are:

- To illustrate the situation of a company that experienced accelerated growth due to external factors (COVID-19 pandemic) and the challenges of sustaining such growth over time.
- To analyze rebranding strategies, sales package structures, value-based pricing, and customer acquisition.
- Additionally, the case can be used to exemplify the balance between social impact and financial sustainability in a social enterprise.

Case Synopsis

In early 2023, NaTakallam—Arabic for “We Speak”—stood at a strategic crossroads. The social enterprise, created to connect forcibly displaced individuals with income-generating language opportunities, had experienced a surge in Business-to-Consumer (B2C) revenues during the COVID-19 pandemic, as global demand for remote learning spiked. However, as the world transitioned back to in-person activities, that momentum waned, and signs of a sustained decline in B2C growth began to surface.

It was in this context that Rafael “Rafa” Durán, a marketing expert and 2016 MBA graduate from IPADE, joined the organization. Upon reviewing the situation, Rafa identified several critical challenges. Should NaTakallam adjust the pricing and structure of its language bundles to increase both customer conversion and upselling? Could language offerings beyond the core generate additional growth, particularly in key markets? Was the company’s organic customer acquisition strategy sufficient in the face of softening demand? And more broadly, how could NaTakallam continue to pursue growth while staying true to its social mission?

Rafa also contemplated whether a rebranding or repositioning effort could help the organization broaden its reach without diluting its identity. With these questions at the forefront, he set out to shape a strategy that could reconcile scale with purpose in an increasingly competitive environment.

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REDTECH: CONVERTING TASMANIAN GOVERNMENT FROM PAPER TO COMPUTER BASED SYSTEMS

Robert Galvin, University of South Florida (student author)
Mathew Mullarkey, University of South Florida (faculty advisor)

Case Objectives and Use

Instructors can use this case as an example of strategic management for students at the undergraduate, graduate and doctoral levels can examine the strengths and weaknesses of RedTech as a company and the viability of its business model in this situation. There were three possible ways forward

- Continue on the current path of contacting Australian government stakeholders remotely.
- Send at least one software developer to Australia to facilitate communication with Australian stakeholders.
- Cut the company's losses and abandon the effort to develop software for the Australian government markets.

Case Synopsis

In January 2023, five colleagues incorporated RedTech in Florida to develop database software for Australian government agencies. At the time, Tasmanian state and local governments operations were still paper-intensive; this resulted in increased operating costs and unnecessary delays in providing basic services to the state's residents. Several other factors compounded the situation. There are 29 county-level governments (styled councils in Australia) on the island; these met information technology requirements without central guidance or de-confliction, leading to enormous duplication of effort. Also, council populations range from hundreds to medium size cities. The smaller councils lack the resources to develop software independently and would likely benefit from assistance from the state.

The RedTech team reviewed the government paper forms then in use in Tasmania and found nothing surprising. Information storage and processing requirements were well within the abilities of standard commercial database engines, and the senior project engineers (Galvin and Meyer) had years of experience automating government paper-based processes. Unfortunately, in nine months of effort, few stake-holders in the Tasmanian government were willing to have substantive discussions with the company.

RedTech had a critical choice: continue the effort to develop software for the Tasmanian government or abandon the effort and cut its losses. The fact that other companies successfully developed software for the Tasmanian government indicated a viable market, and the RedTech team had the technical skills to compete in this market. However, other factors argued against continuing the effort; these include the reluctance of local officials to communicate with team members and the difficulties of coordinating efforts across different time zones.

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SCALING MARKAZ: GROWTH AT WHAT COST?

Farah Naz, IBA, Karachi

Case Objectives and Use

This case is intended for elective courses such as Growth Marketing and Entrepreneurial Marketing courses for undergraduate and graduate-level students. This could also be taught in the Marketing Management course at the graduate-level. The purpose of this case is to explore how an online marketplace, **Markaz**, decide the customer segment to attain profitability. Students will analyze metrics such as CAC, retention, and CLV to assess the sustainability of various growth strategies. By preparing and discussing this case, students will develop data-driven decision-making skills, understand how to optimize unit economics in a two-sided marketplace, and gain insights into launching and scaling ventures in underserved markets.

Case Synopsis

In January 2024, Chief Growth Officer Umair Aslam has to deliver a Series A growth plan that would keep Markaz, the reseller marketplace he co-founded in 2022, on its growth trajectory. The Markaz platform enabled micro entrepreneurs source inventory nationwide and sell it through social media with zero upfront capital. After three years of experimentation Markaz had reduced customer acquisition cost (CAC) from US\$13 to under US\$1 and expanded gross merchandise value (GMV) 46 times. Now Aslam must choose his customer segment for growth, female, or male and which product categories. Female resellers converted 80 % of cash on deliveries (COD) and stayed loyal, but the pool was smaller and slower growing. Male resellers were a bigger segment but eroded margins as 55–66 % of their parcels got paid. Umair's choice must satisfy the board's three tests: low CAC, high lifetime value, and positive contribution margin on every order.

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SCROLL, HOOK, REPEAT: KUKU TV'S STRATEGY FOR MICRODRAMA

Deval Kartik, HEC Paris, Doha

Case Objectives and Use

This case is ideal for teaching at the MBA level in a Marketing course, to introduce the concepts of platform business monetization, elements of value, Customer Lifetime Value, and Sustainable Competitive Advantage in a marketing strategy course, and in a digital marketing course. Additionally, the case can also be used for courses in Entrepreneurship and Platform Business Economics. Depending on the level of the participants, the focus of the topic, and the time available, the instructor can detail calculations of Life Time Value and Customer Retention Strategy (Additional reading sources are provided).

The case study on Kuku's foray into Kuku TV presents an opportunity to discuss category disruption in a digital business that combines content and technology, relying on a subscription model.

While analyzing the case, the students will

- Understand the business model of the Microdrama platforms and the ingredients of their success.
- Introduce the importance of customer acquisition, retention, and Customer Lifetime Value (CLV) in subscription business models.
- Learn about Sustainable Competitive Advantage (SCA) and different sources of competitive advantage for the firm.
- Apply network effects and the SCA to predict a competitive scenario.

Case Synopsis

In April 2025, Kunj Sanghvi, Vice President, Content for Kuku platform, was contemplative about retaining and growing the subscriber base of Kuku platform. Kuku TV, launched in February 2025, became India's first app offering vertical microdrama—short, serialized video content optimized for mobile viewing. Kuku TV tapped into India's mobile-first audience, leveraging the growing popularity of short-form video formats like YouTube Shorts, TikTok Videos, and Instagram reels. Inspired by China's booming microdrama market, Kuku TV pioneered this trend in India, offering content in multiple Indian languages and using AI to streamline production. Kuku FM, the founders' first venture, was launched in 2018, pioneering the offering of non-music audio content in regional languages of India. Kuku FM also reached out to the Indian diaspora in various parts of the world with its fictional, non-fictional, and educational content. Kuku FM's subscriber base of 2.8 million was a ready viewer base for Kuku TV, which was generating additional viewers even faster.⁶³

Microdrama had low production costs and rapid output, making the barrier to entry of competition almost nonexistent. Kuku TV had witnessed fast user growth—2 million subscribers in four months. However, Sanghvi knew that competition from other start-ups and legacy players wouldn't be far behind. He would have to focus on monetization plans, user acquisition, and retention. Kuku TV adopted a subscription-based model and focused on emotionally engaging storytelling with the hope of turning a modest production budget into millions in revenue. With deep insights from Kuku FM's user base and a strong content-forward strategy, Kuku TV positioned itself as a disruptor in India's OTT space. However, sustaining growth and profitability in a soon-to-turn hyper-competitive market remained a key concern.

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THE LIGHT AND SHADOW OF USER-CENTRIC BRAND COMMUNITY: NIO AND ITS “SHAREHOLDERS”

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Qimei Chen, University of Hawai‘i at Mānoa (faculty supervisor)

Case Objectives and Use

This case is designed for undergraduate and MBA courses in marketing, international business, and strategic management. It is particularly well suited for modules on branding, consumer engagement, and global market entry. Students will examine how a firm builds a competitive advantage through user communities, while also grappling with the challenges of brand dilution and strategy transferability. Key learning outcomes include the ability to evaluate community-based strategies and assess user-centric initiatives as a brand differentiator. The case also highlights challenges of global expansion and invites students to consider decision-making under financial pressure, regulatory uncertainty, and technological pitfalls.

Case Synopsis

In 2025, William Li, the founder and CEO of NIO, faced a defining strategic challenge regarding the company's European expansion. Since its founding in 2014, Li had built NIO into a premium Chinese electric vehicle (EV) powerhouse based on his philosophy of the "user enterprise". This unique model treated customers as co-creating partners and was supported by a comprehensive ecosystem: exclusive NIO Houses serving as community hubs, a highly active NIO App, the lifestyle brand NIO Life, and the signature NIO Power battery-swapping service. This user-centric approach was the cornerstone of NIO's success and brand loyalty in China.

However, the attempt to transplant this model to Europe, which began in Norway in 2021 and expanded to Germany and other countries in 2022, was yielding uneven results. While Norway proved to be a stable market with 877 vehicle registrations in 2024, performance in Germany was alarming, with registrations plummeting from 1,263 in 2023 to just 398 in 2024. Adding to the complexity, Li was navigating a multi-brand architecture that could dilute NIO's premium identity. The company had launched two new sub-brands: ONVO for the family market in China, and Firefly, a mass-market brand designed in Europe for urban consumers. While Firefly showed early promise, its lower-cost positioning risked weakening the exclusivity of the core NIO community. These pressures were compounded by NIO's \$3.1 billion loss in 2024 and an 80% share-price decline from its 2021 peak, highlighting the urgent need for a profitable path forward.

Ultimately, William Li was confronted with a critical dilemma. Should he double down and replicate the Chinese playbook in Europe or completely redesign the approach? This decision had to be made while carefully managing the new sub-brands, steering the company toward financial stability, and navigating the opportunities and ethical risks of using AI to deepen user engagement. The path he chose would determine not only NIO's future in the global market but the very identity of his user-centric enterprise.

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TO MOVE, OR NOT TO MOVE? THAT IS THE DECISION

Jasmin Lin, Robert Morris University
Daisy Wang, East Stroudsburg University of Pennsylvania

Case Objectives and Use

This case would be appropriate for an undergraduate or graduate course for International Business, Global Supply Chain Management, Strategic Management, or Risk Management.

Learning Objectives: After completing this case, students should be able to

LO1: Analyze the impact of international trade policy (tariff rate) on sourcing and operations decisions.

LO2: Apply strategic sourcing frameworks in a real-world context of uncertainty and geopolitical risk.

LO3: Assess risk management approaches for mitigating tariff exposure.

LO4: (Upper level class or MBA) Apply Kraljic Matrix Positioning to classify alternative suppliers by supply risk and profit impact.

Keywords: *Tariffs, Location of Suppliers, Global Strategic Sourcing, Supply Chain Risk Management, Kraljic Matrix.*

Theories can be used in analyzing this case.

- Strategic Sourcing is a proactive, data-driven procurement approach that aligns purchasing with long-term goals by evaluating the total cost of ownership, categorizing suppliers, and building high-value partnerships to manage risk and enhance efficiency—reflecting Nishiguchi’s (1994) idea of “strategic dualism,” which combines collaborative manufacturing with continuous improvement.
- The SCRM framework by Bandaly et al. (2012) offers a structured method to identify, assess, and mitigate supply chain risks across internal operations, stakeholders, marketplace, and environmental domains. It prescribes planning processes and risk responses—avoidance, prevention, and mitigation—to bolster resilience and handle disruptions effectively.
- The Kraljic Matrix (Kraljic, 1983) segments suppliers along dimensions of supply risk and profit impact into four quadrants—non-critical, leverage, bottleneck, and strategic—to guide sourcing strategies ranging from cost efficiency to innovation partnerships.

Case Synopsis

This case followed Christy Cheng, CEO of Central Imaging (CI) Company, as she navigated a rising tide of trade uncertainty tied to the potential re-election of Donald Trump and his stated plan to raise tariffs on Chinese goods, possibly exceeding 60%. CI Company, a once-large Taiwan-founded manufacturer turned lean design and sourcing business, faced a critical decision: stay the course with trusted contractors in Guangdong, China, or diversify her supplier base in anticipation of punitive trade policies. Cheng considered options like Vietnam, India, and Taiwan, each with its trade-offs in cost, speed, reliability, and geopolitical risk.

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ORGANIZATIONAL BEHAVIOR & HUMAN RESOURCE MANAGEMENT CASES

Track Chair: S. Bruce Thomson, *MacEwan University*

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Cases	Authors
Balancing Gender Equality and Reality – JCB India, at the Crossroads	Sushmita Srivastava Shyam K C
Caribou – Navigating Radical Innovation in a Dead Industry	Joshua Bell Bruce Thomson
How Can Benedict College Survive This Existential Crisis?	Chantil Wright Galloway
ITC Limited: Promoting Gender Diversity in an Unionized Set-Up	Sushmita Srivastava
Lost in Transition: Freddy Rubio’s Career Dilemma at 28	Juan M. Parra
Merchants SA: Talent Management Tension in Growing the Business Process Outsourcing Industry in South Africa	Claire Barnardo Preeya Daya Sarah Boyd Linda Ronnie
No Time to Change	Karen Boroff Isabel Ortiz Luis Salgado
Susana Vs Hospital VC - A, B And C	Luciana Sabaj Gabriel Vallone Javier J. O. Silva
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**BALANCING GENDER EQUALITY AND REALITY:
JCB INDIA, AT THE CROSSROADS**

Sushmita Srivastava, S P Jain Institute of Management and Research
Shyam K C, IDFC First Bank Ltd.

Case Objectives and Use

This case is developed for a course on Managing Diversity and Inclusion. It is useful for students pursuing a course in HRM. It is targeted at both graduate and postgraduates' levels. The case addresses issues in Strategic HRM, whether and how HR practices need to align with the business strategy? Students will understand the Strategic impact of HR decision making around diversity issues, particularly setting Diversity targets and the challenges therein and the overall impact of diversity practices on the business.

Case Synopsis

This case explores JCB India's pioneering efforts to integrate women into its shopfloor workforce, an initiative that challenged entrenched gender norms in India's male-dominated manufacturing sector. Operating across multiple Indian states, JCB set an ambitious target of achieving 50% female representation in its newly commissioned Vadodara plant, building on the success of exceeding 30% female participation at its Jaipur facility.

Faced with societal resistance, skill availability challenges, and operational constraints, JCB undertook a multifaceted transformation. It established dedicated training programs, upgraded infrastructure for safety and inclusion, and engaged deeply with families and local communities to foster trust and social acceptance. Special initiatives like self-managed teams, equitable pay structures, and accelerated pathways to permanency reinforced the company's commitment to inclusion.

The case spotlights how JCB's inclusive strategy translated into organizational momentum, employee engagement, and long-term competitiveness, while raising important questions about scalability, sustainability, and cultural change in traditional industrial settings.

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 2025 Conference, Newport Beach, California, USA, October 16-18, 2025. © 2025 by : Sushmita Srivastava, SPJIMR, Mumbai, DN Nagar, Andheri West, 9930451952, Sushmita.srivastava@spjimr.org and K C Shyam, Alumni, SPJIMR, DN Nagar, Andheri West, Mumbai 9842222025, pgp19.shyam@spjimr.org

CARIBOU: NAVIGATING RADICAL INNOVATION IN A DEAD INDUSTRY

Joshua Bell, MacEwan University (student author)
S. Bruce Thomson, MacEwan University (faculty supervisor)

Case Objectives and Use

This case is meant for upper-level undergraduate capstone or first-year MBA offerings in Strategic Management, International/Strategic Marketing, Innovation & Entrepreneurship, and Operations/Supply-Chain Management. Designed for senior BCom/BBA students in their final semester and for early-stage MBA cohorts. Participants should already possess basic knowledge of strategy, marketing, and operational frameworks. Students will (i) construct integrated strategy maps linking financial, customer, process, and learning perspectives; (ii) make evidence-based market-entry and positioning plans for Western/Eastern Canada and the U.S.; (iii) design commercialization and supply-chain improvements; and (iv) use strategies that elicit higher-order judgment, primarily the “create” and “evaluate” levels of Bloom, by defending their recommendations with industry-specific terminology and lecture material.

Case Synopsis

Cory, CEO and President of Woodwork and Pub Interiors, suffered a major defeat after he was unable to secure any funding from one of the Dragons on the CBC show Dragon’s Den for his Caribou butcherblock product line, which has a proprietary finish dubbed End + Edge Technology. Despite years of perfecting a product which is the only one of its kind to be waterproof, stain-resistant, and come with a limited lifetime warranty, Cory’s business has continued to struggle to expand outside of Western Canada. Caribou, owned by Woodwork and Pub Interiors, initially emerged from a small millwork company that stumbled upon a high-performance finish during a commercial project. Throughout the years, Cory and his team developed this coating further into a full-on proprietary finish, which led to higher profit margins for their butcher block products (a 10-30% price premium average compared to similar millwork shops). However, WWP faced issues scaling and entering new markets, particularly the residential segment, shipping to Eastern Canada, and exporting to the U.S. After the show aired, Cory and his team are still low on cash flow capital, and another business loan won’t help the Caribou wood brand with the main issue they have, which is a combination of distribution constraints, extreme shipping costs, reduced manufacturing capacity, and lack of product awareness from the consumer. With that, Cory is now looking at a major strategy shift as he has grown tired of trying to sell his innovative product, a matte waterproof wood finish, in a ‘slow and old’ market. This case highlights the real-world challenges of commercializing an innovative product, especially in a niche market like butcher block manufacturing, where most consumers simply purchase other material (i.e. marble, stone, etc) or non-native North American wood for cheaper, like Teak or Bamboo wood, from distributors/retail chains that can eat most product shipping costs with volume orders. Now Cory and his team are looking to expand their use of this proprietary finish beyond butcherblock, but the finish is labour-intensive and lacks infrastructure to support global scaling. This case study demonstrates that the complexities of innovation vary based on market conditions, and even breakthrough products are not recognized unless an organization has sufficient strategic market entry, operational efficiency, and sufficient long-term cash flow to achieve long-term success.

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HOW CAN BENEDICT COLLEGE SURVIVE THIS EXISTENTIAL CRISIS?

Chantil Wright-Galloway, Benedict College
Janis Gogan, Bentley University (faculty supervisor)
Jeffrey Shay, Babson College (faculty supervisor)

Case Objectives and Use

This case targets MBA/Executive MBA courses in Crisis Management, Strategic Management, and Organizational Leadership, plus advanced undergraduate management courses. It addresses crisis leadership under existential threat, strategic decision-making with severe time and resource constraints, stakeholder management with competing demands, and unique challenges facing minority-serving institutions when Dr. Artis faces losing \$12.75 million (18% of operating budget) with only 48 hours to decide.

Students develop skills in rapid threat assessment, financial impact analysis under uncertainty, multi-stakeholder communication strategies, and high-stakes decision-making with imperfect information. They learn to balance organizational survival with mission integrity, navigate impossible trade-offs, and recognize when traditional "best practices" fail due to systemic constraints. The case's real-world complexity—where no option is clearly optimal—prepares students for authentic senior leadership challenges requiring both courage and pragmatism.

Case Synopsis

On January 21, 2025, Benedict College President Dr. Roslyn Clark Artis faces an unprecedented crisis when Executive Order 14151 threatens to eliminate \$12.75 million in federal and corporate funding (18% of operating budget) by targeting programs with DEI-related language. The 155-year-old HBCU in Columbia, South Carolina serves 1,700+ students who are 94% African American, 68% first-generation, with median family incomes of \$27,000.

With a self-imposed 48-hour deadline, Dr. Artis—who previously transformed Benedict's finances by reducing debt from \$86M to \$30M and tripling net tuition revenue—must choose among three strategic options: Stand Together (lead sector-wide legal resistance), Quietly Reframe (systematically replace DEI language with workforce development terminology), or New Students in New Online Programs (accelerate digital transformation through partnerships). With \$9.55M in federal grants and \$3.2M in corporate partnerships at immediate risk, her decision will determine whether Benedict can continue serving first-generation, low-income students while preserving its historic mission as an HBCU.

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ITC LIMITED: PROMOTING GENDER DIVERSITY IN AN UNIONIZED SET-UP

Sushmita Srivastava, S P Jain Institute of Management and Research

Case Objectives and Use

This case is developed for a course on Managing Diversity and Inclusion amongst the unionized workforces. It is useful for students pursuing a course in HR and IR at both graduate and postgraduates' levels. The case addresses issues on how Union-management relationships need to align with the diversity strategy. Students will understand how to navigate change management issues at the shop floor and acquire the skills of solving sensitive people issues amongst the blue collared workforce

Case Synopsis

Indian Tobacco Division Plant of ITC at Ranjangaon, Pune India did not have females on the shopfloor as hitherto- the representation of women in the workforce in the ITD division had been abysmal due to the widespread notion that women cannot be employed in a cigarette factory. Jag Bandhu Samanta the HR head of the Ranjangaon plant wanted to play a pioneering role in this noble cause. He was personally motivated and inspired to do so from his previous work stint at the Monger plant in Bihar that historically employed many women

However, Samanta was confronted with opposition from the union office bearer when he made the suggestion at the new plant. The office bearer even threatened to resign on hearing his suggestion as he was worried that displacement of workmen from the primary section -to accommodate women employees would not go down well with the people. The other section was Quality control department (QCD) , which was manned by multiskilled workmen that brought operational flexibility and addressed absenteeism issues. The Plant head on hearing the problem posed by the union, suggested Samanta should re-examine the situation as placing women in QCD would disrupt the rotational opportunities of the workmen. The Plant Head therefore, suggested to Samanta that he should think about the issue of female employees after the forthcoming wage settlement.

Samanta along with Astha, his teammate had already started preparing the ground, through creating awareness sessions and highlighting the need to have women employees. When Samanta shared the applications received from women employees for the position, another office bearer wanted to bring this up matter at the bargaining table. Samanta was locked in another dilemma. Should he drop the idea of employing women and keep them extra to the standard force. Can he face the resistance from the union and the Plant Head in placing them in the Primary or the secondary sections. The decision by the protagonist would not only herald a turn in Union Management relations but also seal the fate of engaging women on the shopfloor of the Ranjangaon plant.

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LOST IN TRANSITION: FREDDY RUBIO’S CAREER DILEMMA AT 28

Juan M. Parra, INALDE Business School

Case Objectives and Use

This case was originally developed for use at the end of undergraduate programs, particularly in courses related to career planning. It is valuable because: 1) It illustrates the “turning points” that can occur during the early stages of a professional career; 2) It focuses on key decisions made during the first ten years of professional life (what to study, where to work, when to change, whether to pursue an MBA); 3) It highlights how the role of mentors and advisors plays a critical part in the development of sound judgment..

After reading and discussing this case, participants will be able to:

1. Identify the different roles individuals adopt during the transition to adulthood—according to McAdams’ Actor-Agent-Author framework (2013)—and evaluate their impact across various life dimensions over time.
2. Reflect on how career turning points relate to the way we make decisions in response to life-stage contingencies.
3. Use the Ikigai model as a framework to define useful criteria for making career decisions (talent, compensation, passion, and societal need).

Case Synopsis

“Now, where do I go from here?” wondered Freddy Rubio, a 28-year-old psychologist who had spent the past five years working at a marketing and events company. Although he had enjoyed the experience, he now felt that those years had cost him valuable time when it came to building a more competitive career. Feeling stuck and going through a severe depression triggered by a recent breakup, Rubio saw much of what he had done so far as a waste. He knew he needed to make bold decisions, but the broader context made it difficult: the country was quickly heading into an economic recession. Rubio faced a crossroads: invest heavily in an MBA abroad or pursue a promising corporate role or keep his current job.

The MBA, set to begin in three months, required a considerable loan and his entire savings, but it offered the potential to double his income. Meanwhile, a healthcare company revived its hiring process for a Head of Communications role, where Rubio had been shortlisted. The job promised a salary boost of at least 20% and career growth in a big corporation, with considerably less risk. Meanwhile, his current boss was counting on his participation in organizing a major event scheduled in just two months. Rubio wondered whether he should inform her that he was considering resigning soon. Some of his colleagues informed him that another department had just undergone another round of layoffs, and that those who left were not being replaced.

Rubio didn’t want to keep feeling like he was wasting valuable time, yet he was facing considerable risks. Overwhelmed, he thought: “My twenties are almost over, and I still have nothing to show for it. I had a better résumé when I graduated from college.”

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 2025 Conference, Newport Beach (A), October, 2025. © 2025 by Juan M. Parra. INALDE Business School. Campus Universidad de La Sabana, Km. 7, AutoNorte, Chia, Colombia, +578614444, juanm.parra@inalde.edu.co

MERCHANTS SA: TALENT MANAGEMENT TENSION IN GROWING THE BUSINESS PROCESS OUTSOURCING INDUSTRY IN SOUTH AFRICA

Preeya Daya, University of Cape Town
Linda Ronnie, University of Cape Town
Claire Barnardo, University of Cape Town
Sarah Boyd, University of Cape Town

Case Objectives and Use

This case is suitable to teach students in postgraduate business and management programmes, and executive education courses, that focus on HR and talent management strategies in Africa and emerging markets.

The teaching objectives include:

- To understand the delicate balance of the talent market within a new and competitive industry such as BPO
- To identify and understand employee engagement in a growing industry in an emerging market context
- To analyse the relationship between low employment engagement and employee attrition
- To propose an employee engagement strategy in human resources in a new industry

Case Synopsis

This case looks at the business process outsourcing (BPO) industry in South Africa through the protagonist Sydwell Shikweni, transformation director at Merchants SA. The BPO industry is set to expand and create up to 500,000 jobs by 2030 in South Africa which has become an offshore destination of choice for the service industry. As Merchants SA starts to scale, Shikweni considers the reality of staffing in 2022 – especially at the middle-senior management category. He is concerned as there is a lack of talent at this level. As BPO is a relatively new industry there has not been enough development in terms of skill at this level. This has resulted in short-term poaching from a small pool of existing talent between companies. Shikweni must resolve the talent issue or risk the greater goal of growing more jobs for the industry and country. Will he make it in time?

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NO TIME TO CHANGE

Isabel Ortiz, Universidad Politécnica de Madrid
Karen Boroff, Seton Hall University
Luis Salgado, Universidad Politécnica de Madrid

Case Objectives and Use

This is a short case, developing students' competencies in understanding and applying the concept of resistance to organizational change and specifically resistance to change at the individual level. Given that it is a short case, it is especially geared to undergraduate students but given the age and the career moment of the protagonist, the case is also appropriate for graduate students. The learning objectives center on understanding the term "change agent," understanding and applying the sources of resistance to change at the individual level (as opposed to the organizational level), and developing strategies on how one might overcome his/her individual resistance to change. Potential courses are organizational behavior where the topic of change management is presented or a course in human resource management where talent development or career management is presented.

Case Synopsis

This short case centers on individual resistance to change, nested a career decision that a long-tenured faculty member at an international institution has before her—either to take a new position for the institution but outside her home country or to continue to grow her Center on Leadership and Technology in her home country. The case highlights the resistance to change in the theoretical literature, especially focusing on who is a change agent and why do individuals (as opposed to organizations) resist change and how to overcome that resistance. The case itself evolved from circumstances that arose in the late fall of 2024 in a university outside the United States. The case is disguised, as detailed in the Research Methods section of the Instructor's Manual.

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SUSANA VS HOSPITAL VC - A, B and C

Luciana Sabaj, UCU Business School
 Gabriel Vallone, UCU Business School (faculty supervisor)
 Javier J. O. Silva, UCU Business School & UdeSA Business School (faculty supervisor)

Case Objectives and Use

This case is designed for MBA students enrolled in a Negotiation course. It can also be effectively used in other negotiation courses within graduate and postgraduate programs. The case is particularly well-suited for exploring topics such as negotiation dynamics, sources of power, and the application of Harvard's principled negotiation method in team-based settings.

Learning objectives:

- Identify the key factors that influence negotiations, with a particular focus on leverage and teamwork.
- Understand the importance of internal cohesion and collaboration in developing strategies that create value in negotiations.
- Recognize, assess, and strengthen the Best Alternative to a Negotiated Agreement (BATNA) to improve one's positioning, regardless of whether an agreement is reached.
- Reflect on individual negotiation behaviors and learn to shift from positional bargaining toward interest-based negotiation for more effective outcomes in future scenarios.

Case Synopsis

In February 2024, Susana, a patient with stage IV cancer, traveled to Brazil in search of an accurate diagnosis and appropriate treatment. Her decision was prompted by repeated misdiagnoses at the Uruguayan VC Hospital, which left her family justifiably distraught and dissatisfied with the local medical care.

The proposed treatment in Brazil showed a high probability of success but came with a prohibitive cost of \$100,000—an amount Susana could not afford. Desperate and pressed for time, her family decided to approach the VC Hospital's board of directors to negotiate financial support for the Brazilian treatment.

Dr. Clara G., a member of the hospital's medical team, had recently been asked to meet with the family. Although concerned about Susana's condition, she concluded that the patient had acted irresponsibly by abandoning her treatment in Uruguay and traveling abroad without notifying her medical team. Nevertheless, she agreed to coordinate a meeting with family representatives to discuss a possible course of action.

A week later, a meeting took place at VC Hospital, bringing together three representatives of Susana's family and members of the hospital's team: Dr. Clara, the general manager, and the institution's legal counsel.

The case provides the necessary elements for students to engage in a role-play negotiation between the parties.

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 2025, Newport Beach, California, USA. October 17-18, 2025. All rights are reserved to the authors and NACRA. © 2025 by Luciana Sabaj supervised by Gabriel Vallone & Javier J.O. Silva. Contact person: Javier Silva, UCU Business School - Uruguay, javier.silva@ucu.edu.uy

YMCA OF NORTHERN ALBERTA: MISSION OR MARKET? REPOSITIONING THE DON WHEATON YMCA

Joshua Bell, MacEwan University (student author)
Nahuel Medina Garcia, MacEwan University, (student author)
Bruce Thomson, MacEwan University (faculty supervisor)
Charles Keim, MacEwan University (honorary author)

Case Objectives and Use

This case is meant for higher-level undergraduate capstone courses or first-year MBA offerings in Strategic Marketing, Services & Non-Profit Management, Social Enterprise Strategy, and related Operations/Service course offerings. A specific emphasis is on senior BCom/BBA students in their final semester and for early-stage MBA cohorts.

Students should build integrated strategy maps that align financial sustainability with member value, service offerings, and volunteer/staff capacity; formulate evidence-based positioning and membership-growth plans for downtown Edmonton, surrounding suburbs, and potential digital markets; design service innovation and partnership initiatives—such as hybrid memberships, corporate-wellness bundles, and community alliances—that fit nonprofit resource constraints; and defend strategic recommendations with data-driven analysis and sector-specific reasoning relevant to Canada’s competitive fitness landscape and the YMCA’s social-impact mandate.

Case Synopsis

This case study presents Kent Bittorf, the Vice President of Health Fitness and Aquatic Facilities at the YMCA of Northern Alberta, who has been tasked with returning the YMCA’s Don Wheaton facility back to positive cash flow. Bittorf is faced with a facility that has experienced a strong decline in membership count and revenue as a result of the changes in the corporate workforce that occurred due to the COVID-19 pandemic. In the primary situation, Bittorf must design a plan to bring the facility back to positive growth and regain lost market share. The case asks: how can the YMCA reposition and differentiate its services to thrive in a changed post-pandemic environment? Students must weigh strategic marketing decisions (service offering, pricing, positioning, promotion) alongside psychological and sociological considerations (consumer loyalty, social value, community engagement). The outcome hinges on balancing the YMCA’s charitable mission with the need for financial sustainability, “mission versus market”, in developing a plan to rebuild membership and brand relevance.

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SOCIAL IMPACT AND SUSTAINABILITY CASES

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

Co-Chair: Stephanie Raible, University of Delaware

Cases	Authors
Changing Customer Requirements and the Ethics of Cosmetic Companies: The Case of South Korean Beauty Company	Irina Heim Xiaohua Young Youngwon Park
Designing Pathways to Competitive Employment	Joel Kotanko Christy Nammour
High Speed Decisions: Terrabees Sustainable Leap Forward	Siddharth Wadehra
Liquids Revolution: Change Management Challenges – How to Convince Customers to Adopt Innovative Sustainable Property Management Solution.	Jane Gravill Homeira Ekhtari
Pasqual Maragall Foundation: Scaling to Defeat Alzheimer’s from Barcelona to the World	Maria Ballesteros-Sola Josep Lluís Cano Giner
Sahyadri farms- A Case of Intertemporality in Decision Making	Arun Bhanumurthy Anubha Sinha
Vo-LaSalle Farms, Inc.: The CUPS Decision	Michelle DeMoss Ram Subramanian
What’s in a Name? Getting Buy-in for Buy Social USA	Stephanie Raible Morgan Brown

CHANGING CUSTOMER REQUIREMENTS AND THE ETHICS OF COSMETIC: THE CASE OF SOUTH KOREAN BEAUTY COMPANY

Irina, Heim, University of Reading
Xiaohua, Young, University of San Francisco
Youngwon Park, University of Tokyo

Case Objectives and Use

This case fits within a course focused on sustainability in business, ethical decision-making, or corporate social responsibility, strategy and international business. The level of courses: BSc, MSc and MBA. It examines how evolving consumer demands and ethical considerations drive application of green chemistry—a strategy dedicated to developing environmentally friendly products and processes. By preparing and discussing this case, students will develop several critical insights and skills, including strategic sustainability thinking, ethical decision-making, stakeholder analysis, interdisciplinary problem-solving and global market trends and analysis.

Case Synopsis

Since its inception in 1992, Korean COSMAX has become a formidable OEM/ODM player in the global market, serving 15 out of 20 world's leading cosmetics brands. This case explores the critical decisions facing the management team in 2025, especially Mr. Choi, the senior VP who heads the global expansion and sustainability business on how to balance global expansion and increasing costs of compliance with sustainability regulations in other countries. The case raises questions about a long-term strategy for market expansion and sustainable sourcing that aligns with the principles of green innovation, balance between financial performance and sustainability investments, stakeholder collaboration and co-creation, and the integration of sustainability into core business strategy and practices, the impact of national culture and client relationships on sustainability and ESG practices. Specifically, this case study examines the firm's strategic transformation as it navigates the complex demands of sustainability and ESG (Environmental, Social, and Governance) compliance and global expansion. As a global supplier of major beauty brands, the company faces mounting pressure from clients and regulators, especially those in Europe, to comply with stringent sustainability regulations and standards while maintaining cost competitiveness. COSMAX must balance the costs and benefits of these investments, address cultural and operational challenges, and decide whether to continue as a loyal OEM/ODM producer for major beauty brands or develop its own global beauty brand. The case takes a deep dive into the decision making process of the top corporate leaders on to how to make the best possible decision to help the company not only to float, but also thrive in the global dynamic, but booming cosmetic and beauty industry: K-beauty is spreading the world like a wild fire, but a new business model to manage sustainability and ESG compliance cost-effectively is critical for a small cosmetics firm like COSMAX.

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DESIGNING PATHWAYS TO COMPETITIVE EMPLOYMENT

Joel Kotanko, University of South Florida (student author)
Christy Nammour, MacDonald Training Center, Inc.

Case Objectives and Use

This case is suitable for senior undergraduate and graduate courses (e.g., MBA, MPA) in strategic management, nonprofit/NGO management, social entrepreneurship, program evaluation, or disability and social services administration. The target audience is students with some prior exposure to strategic planning or nonprofit concepts. The case addresses program innovation in a disability services nonprofit, focusing on mission-driven strategy, stakeholder relationships, and resource dependencies. Key issues include designing a new employment program, balancing the nonprofit's social mission with financial and funding constraints, and improving workforce development outcomes for people with disabilities. Students will learn to apply analytical frameworks (SWOT, stakeholder analysis, resource-dependence theory) to evaluate strategic options and align them with organizational goals.

Case Synopsis

By early 2017, MacDonald Training Center (MTC) – a Tampa-based nonprofit serving adults with intellectual and developmental disabilities – was at a crossroads. CEO Karenne Levy was haunted by a parent's question: "What happens to my son after high school if part-time work is all there is?" Although MTC had a strong record of day programs and life-skills training, many capable clients were ending up in low-wage, dead-end jobs. National and state data underscored the urgency: in 2016 only 17.9% of Americans with disabilities were employed, and in Florida just 30.4% of working-age adults with disabilities had jobs. These figures highlighted a gap between Florida's legislative promise of equal opportunity and the reality of very low workforce participation for people with disabilities. Levy and her leadership team recognized that systemic barriers – such as inaccessible transportation and pervasive employer bias – made achieving competitive employment especially difficult. Seeking a solution, Levy convened a task force of MTC staff and external experts to evaluate strategic options. Three main alternatives emerged. Option A: an industry-certified training program (the EXCEL model) delivering short-term courses and professional credentials in high-growth fields. Option B: to maintain a conventional vocational training program. Option C: expand supported employment services, placing clients directly in community jobs with on-site coaching.

The certification program promised marketable credentials and stronger career pathways but required significant investment and organizational change. The vocational track was familiar and less costly, but critics noted it would likely yield only low-wage, high-turnover jobs. Supported employment had proven effectiveness and quick placements yet provided limited paths to advancement and increased dependency on external employers. MTC's situation illustrates the challenges nonprofits face when external resource dependencies shape strategic choices. Ultimately, Levy and her board must decide which path best advances MTC's mission – to help clients "develop skills and pursue their dreams" – given the organization's resources and constraints. The case ends with the decision pending, providing a rich scenario for classroom discussion of mission-driven strategy and nonprofit innovation.

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HIGH SPEED DECISIONS: TERRABEES SUSTAINABLE LEAP FORWARD

Siddharth Wadehra, Indian Institute of Management, Ranchi.

Case Objectives and Use

This case is designed for MBA, Executive MBA, and Executive Education programs, particularly suited for strategic management, sustainable business strategy, ESG implementation, and supply chain management courses. It works effectively in specialized courses on strategic innovation, disruptive innovation, and international business with emerging market focus.

The case examines critical strategic challenges including evaluating transformative sustainability investments against incremental improvements, balancing revolutionary innovation with financial prudence, and leveraging sustainability as a disruptive competitive force. Students confront the tension between short-term stability and long-term positioning while navigating regulatory uncertainty in emerging technologies.

Learning outcomes include developing strategic decision-making skills under uncertainty, applying key management frameworks (BCG Matrix, Blue Ocean Strategy, PESTEL analysis, Business Model Canvas) to sustainability challenges, and understanding how environmental considerations reshape competitive dynamics. Students gain insights into first-mover advantages, business model transformation, stakeholder management during high-stakes decisions, and balancing ambitious sustainability goals with financial viability in rapidly evolving industries where sustainability is becoming a baseline expectation.

Case Synopsis

In August 2022, Nirmal Natarajan, CEO and cofounder of Terrabees, faces a pivotal strategic decision that could define his company's future. Terrabees, a tech logistics company, has established itself as a formidable force in Southeast Asia's competitive logistics landscape through its AI-powered platform serving e-commerce and food delivery companies across four countries. The company built its success by positioning itself at the intersection of affordability and technological sophistication, offering "smart shipping for everyone, regardless of business size."

However, the logistics industry is rapidly evolving as sustainability shifts from a market differentiator to a baseline expectation. Singapore's stringent Green Plan 2030, demanding corporate clients focused on carbon reduction, and investor scrutiny of environmental metrics have created new competitive pressures. Following a board meeting where his revolutionary "Terrabees Hybrid" hyperloop infrastructure proposal received cautious interest rather than enthusiastic approval, Natarajan must decide within two weeks whether to scale back his transformative vision or fight for the bold innovation he believes necessary. The hyperloop concept promises unprecedented benefits—70% faster delivery times, 85% carbon reduction, and 30% cost savings—but requires massive capital investment and significant execution risks that could potentially bankrupt the company.

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 2025 Conference, Newport Beach, California, USA, October 16-18, 2025. © 2025 by Siddharth Wadehra. Contact person: Siddharth Wadehra, Indian Institute of Management- Ranchi, Prabandhan Nagar, Nayasarai Road, Jagarnathpur, Ranchi- 835303, Jharkhand, +971-523220846, siddharth.wadehra20eph@iimranchi.ac.in

LIQUIDS REVOLUTION: CHANGE MANAGEMENT CHALLENGES – HOW TO CONVINCING CUSTOMERS TO ADOPT INNOVATIVE SUSTAINABLE PROPERTY MANAGEMENT SOLUTIONS

Jane Gravill, Conestoga College
Homeira Ekhtari, Conestoga College

Case Objectives and Use

This case is intended for Introduction to Sustainability, Change Management courses in an undergraduate program. The theoretical frameworks applied are Triple Bottom Line (Social, Environment, Economic) and Change Management model (Kotter 1995). Change management and sustainability are closely linked, as effective change management is crucial for implementing and maintaining sustainable practices within organizations. Furthermore, communication and education strategies for effective change management are required for success.

Sararus, Liquids Revolution (LR) owner, was faced with change management challenge to convince his customers to adopt his counter-intuitive winter property management liquid de-icing solution.

The case analysis provides a scaffolded learning experience for students. The case discussion begins with an analysis of the situation LR faces and an examination of the barriers and challenges to achieving the LR mission. This initial step helps students become familiar with the case setting and allows them to develop a good foundation of case situation knowledge to assist with more detailed analysis.

Then, students identify the SDGs involved and proceed to the application of the Triple Bottom Line framework to allow students to organize the issues into people, place and profit categories within the framework. As the case analysis is scaffolded from more basic to increasingly further in-depth analysis, the next step asks students to apply Kotter's Change Management model to the case situation that they have now been fully immersed in to identify several alternatives LR can implement to convince customers to adopt the liquid de-icing model.

Finally, students are asked to develop their recommended approach, with justification, for LR to convince customers to adopt the new sustainable liquid de-icing solution, with a high-level implementation plan.

Case Synopsis

Early January 2025 was a time of reflection for Dion Sararus, Owner of Dundee Nursery & Landscaping (LR), New Dundee, Ontario, Canada. Sararus wondered how he could convince existing clients and potential customers of the benefits of using the new sustainable liquid de-icing solution that he had engineered.

Customers were hesitant to embrace the new sustainable technology and invest in the new, innovative approach to property management as - though the new solution used less salt and was more cost effective in the longer term - it required a higher initial investment and was counter-intuitive in approach. How can Sararus change customers perspective on the new winter property maintenance techniques and encourage them to adopt the longer-term sustainable solution?

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 2025 Conference, Newport Beach, California, USA, October 16-18, 2025. © 2025 by Jane Gravill and Homeira Ekhtari. Contact person: Jane Gravill, Conestoga College, School of Business, 299 Doon Valley Dr., Kitchener, Ontario, Canada N2G 4M4. jgravill@conestogac.on.ca

**PASQUAL MARAGALL FOUNDATION:
SCALING TO DEFEAT ALZHEIMER'S FROM BARCELONA TO THE WORLD**

María Ballesteros-Sola, California State University Channel Islands
Josep Lluís Cano Giner, ESADE Business School (Ramon Llull University)

Case Objectives and Use

This case is designed for use in upper-level undergraduate and master's-level courses in Nonprofit Management, Social Sector Leadership, and Strategic Management for Mission-Driven Organizations. It is particularly relevant in courses exploring nonprofit strategy, internationalization, and mission-driven growth. The case allows students to apply conceptual frameworks well established in the for-profit sector, such as multi-sided platform (MSP) and CAGE, into the third sector. It can also be effectively integrated into executive education or certificate programs focused on nonprofit leadership, global health organizations, or the governance of research-based foundations.

Case Synopsis

In June 2025, Gloria Oliver Rodriguez, Deputy CEO of the Pasqual Maragall Foundation (PMF), stood at a strategic crossroads. From the Foundation's headquarters in Barcelona, she contemplated a significant decision: how and where to expand PMF's impact internationally. With a mission to eradicate Alzheimer's through cutting-edge research and awareness, the PMF, founded in 2008, had more than doubled its budget to surpass the €30M threshold in four years and became a recognized player in Spain's scientific and philanthropic landscape. Yet internationalization remained an unresolved challenge. The case follows Oliver as she leads the Steering Committee proposing a viable internationalization plan, including the why, the what, where, and by when. This work will be shaped by PMF's previous attempt to expand into the US, Andorra, and Switzerland in the late 2010s, a well-intentioned but ultimately unsuccessful initiative.. The case prompts critical thinking about how nonprofit organizations could be understood as multisided platforms balancing credibility, fundraising demands, and strategic growth, particularly in the high-stakes, emotionally charged field of Alzheimer's research.

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SAHYADRI FARMS: A CASE OF INTERTEMPORALITY IN DECISION MAKING

Arun Bhanumurthy, IIM Kozhikode India (student author)

Anubha Shekhar Sinha, IIM Kozhikode India

Case Objectives and Use

The case is targeted for students in an MBA program with a specific focus on leadership, strategic decision making, directional conflicts, social entrepreneurship, strategy, sustainability management & operations management. The case shall expose them to a wonderful blend of each of these elements. Though the core focus shall be intertemporality, sustainability, organizational strategy and transformative leadership.

Case Synopsis

Time Frame: August 2024, Protagonist: Vilas Shinde, Chairman and Managing Director of Sahyadri Farms.

Vilas Shinde, a progressive farmer-turned-entrepreneur, stands at a critical juncture in Sahyadri Farms' journey. Founded in 2010 in Nashik, State of Maharashtra, India- Sahyadri has grown into India's largest farmer-owned agri-value chain enterprise, with over 25,000 member farmers and an expansive portfolio of horticultural products processed and marketed under a unified brand. Operating in the dynamic and fragmented Indian agri-food sector characterized by smallholder farming, volatile pricing, and broken supply chains. Sahyadri has built a unique model grounded in farmer empowerment, value chain integration, and sustainability. This case explores the emergence of a farmer-led collective enterprise that has scaled from modest beginnings into one of India's more visible Farmer Producer Companies (FPCs). Through Sahyadri's trajectory, the case raises important questions about the interplay between scale, sustainability, and shared ownership. It traces how the enterprise has attempted to embed sustainability into operations, viewing nature as a stakeholder rather than an externality, and how trust and transparency were prioritized through digital and governance initiatives. As the case unfolds, students are invited to critically examine the tensions inherent in maintaining founding values while pursuing growth. These are particularly in contexts shaped by resource constraints, climate pressures, and shifting stakeholder expectations. It encourages reflection on whether the very mechanisms that enable scale and competitiveness might unintentionally risk distancing the enterprise from its original constituency-the small or marginal farmer.

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VO-LASALLE FARMS, INC.: THE CUPS DECISION

Michelle DeMoss, Stetson University
Ram Subramanian, Stetson University

Case Objectives and Use

The main focus of this case is sustainability in terms of the environment, citrus production in Florida, and smaller family farms. The case requires students to incorporate ethical and sustainability questions into a strategic decision on the part of the decision maker. Thus, this case is intended for an undergraduate course in business and society, a senior-level undergraduate, or a first-year graduate course in sustainability management. After reading, analyzing, and discussing the case, students should be able to:

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

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

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

Case Synopsis

Steven Crump is a fourth-generation president of Vo-LaSalle Farms, Inc., located in DeLeon Springs, Florida. The farm historically has focused mainly on citrus production. However, in the last few years, due to the rise of citrus greening, Steven has expanded the crops to “you-pick” vegetables as well as an increased focus on the farm’s retail business. To combat citrus greening, Steven experimented with a new method of growing citrus under a protective screen (CUPS) on two and a half acres of the farm. He found that the farm’s citrus production increased along with the price per box for citrus grown using CUPS. However, there were risks involved with CUPS, namely the high cost of building the infrastructure needed and the increasing number of severe weather events in Florida that could damage or destroy the infrastructure. With his mother’s retirement and son’s desire to enter the family business, Steven felt a sense of urgency and purpose to expand the use of CUPS to increase the amount and quality of the farm’s citrus production. However, Steven’s wife pointed to two other options – to either forgo investing in CUPS due to the potential risk or delay the CUPS investment until the family’s Illinois farm began earning revenues from a recent solar farm agreement. Steven had to make a decision quickly given he would need to start work on CUPS prior to the start of the June 1st hurricane season.

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WHAT'S IN A NAME? GETTING BUY-IN FOR BUY SOCIAL USA

Stephanie E. Raible, University of Delaware (faculty supervisor)
Morgan A. Brown, University of Delaware (student author)

Case Objectives and Use

Due to the cross-sectoral nature and interest of social procurement, this case is appropriate for undergraduate or graduate student audiences enrolled in entrepreneurship, social entrepreneurship, sustainability entrepreneurship, business and society, corporate social responsibility, nonprofit management, and public administration courses. The theories and topics addressed in the case include social procurement, legitimacy theory, organizational name changes, and the ambiguous nature of the term, social entrepreneurship.

Case Synopsis

Set in 2023, Rebecca Dray, Executive Director of Buy Social USA, was just a week away from an important board meeting to discuss a big challenge they were facing. While other Buy Social organizations in Europe, Australia, Canada, and elsewhere were thriving, Buy Social USA was not meeting its targets for improving social procurement in the U.S.: building a country-wide network of organizational buyers and social enterprise suppliers. Dray realized that the name of the organization might be part of its challenge. Although she had been floating the idea of a name change for Buy Social USA, the “Buy Social” name was linked to a broader international network of like-minded organizations doing similar work. Would a name change be what Buy Social USA needed to be more comprehensible to the entities it served, or would it unwind all the progress made in the U.S. market for social enterprise?

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STRATEGY AND POLICY CASES

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

Co-Chair: Leif Lundmark, University of Nebraska Omaha

Co-Chair: Terry McGovern, University of Wisconsin – Parkside

Cases	Authors
Branding With Purpose: What's Next for Atlas York Insurance?	Brooke Klassen
Carne Asada Kitchen: Overcoming Business Challenges	Marcia Lorena Rodríguez-Aldana
Genexus: To Sell or Not to Sell... That is the Question	Ana Gabriela Marana Mestre Florenca Manrique Manrique Barreto Javier Silva Juan J. Moreno
Netflix: The Battle Against Sleep	Enrique Chamas Ethel Pis Diez
Scaling Against the Grain: Lasenta Lewis-Ellis and LLE Construction Group	Raquel M R Thomas
Solo Funds: Peer to Peer Lending at the Edge of Innovation – A Mission Tested by Regulation	Katayoon Beshkardana Haesang Park Fredrick Rice Nicholas Fletcher
Supportworks' Shifting Ground in the Foundation Repair Industry: Imitation & Consolidation	Leif Lundmark Erin Pleggenkuhle-Miles Kaleb Heckens
The Dilemma of Ukrainian Consumer Lending Sector Under the Pressure of War and Digital Transformation	Oleksandr Reutov Matthew Mullarkey

BRANDING WITH PURPOSE: WHAT'S NEXT FOR ATLAS YORK INSURANCE?

Brooke Klassen, University of Saskatchewan

Case Objectives and Use

This case is designed for upper-level undergraduate students enrolled in courses such as Strategic Management or Marketing Strategy. It is particularly well-suited for exploring how small, values-driven firms can compete in commoditized industries by leveraging brand differentiation, service innovation, and purpose-driven positioning. The case also introduces financial analysis as a practical tool for evaluating growth opportunities, making it a strong fit for discussions that bridge qualitative strategy with quantitative decision-making.

By working through this case, students will be able to:

1. Analyze how companies can position and differentiate themselves in markets where products or services are largely undifferentiated.
2. Formulate structured decision criteria to evaluate strategic options such as acquisition offers.
3. Apply financial analysis to assess the sustainability and implications of different business models.
4. Evaluate strategic growth options and develop recommendations using both qualitative and quantitative considerations.

Case Synopsis

Sarah Johnston, co-owner and CEO of Atlas York Insurance, is grappling with the pivotal decision of whether to accept a buyout offer from a larger Alberta-based brokerage. In just two years, Atlas York has grown rapidly from a single-location brokerage in rural Saskatchewan to a multi-location, values-driven firm known for its personalized service and strong community presence. Built without external investment or advertising, the company's growth has attracted industry attention – but internally, the team is stretched to capacity. In 2025, Johnston needs to determine how to scale sustainably without compromising Atlas York's purpose, culture, or service model. Students are challenged to assess how Atlas York differentiates itself in a commoditized industry, develop decision criteria aligned with the company's purpose, analyze financial sustainability using the firm's income statement, and apply both qualitative and quantitative reasoning to recommend a path forward.

CARNE ASADA KITCHEN: OVERCOMING BUSINESS CHALLENGES

Marcia Lorena, Rodríguez-Aldana, Tecnológico de Monterrey

Case Objectives and Use

This case is useful for understanding the challenges of balancing family traditions with operational innovation in a competitive restaurant industry. The case highlights tensions in generational transitions, modernization needs, and market adaptation in emerging contexts like Mexico's quick-service restaurant sector.

The most relevant teaching objectives are as follows:

- Diagnose a company's strategic position in a competitive market using Porter's Five Forces and PESTLE, identifying dilemmas of consistency and adaptation to emerging trends.
- Analyze dynamic capabilities to detect improvement opportunities and align operations with strategic objectives in response to competitive and macro-environmental changes.
- Formulate coherent strategic actions tailored to the company's needs, strengthening adaptability and long-term competitiveness.
- Apply SWOT/TOWS, Porter's Five Forces, and PESTLE to evaluate internal and external factors shaping the company's position.

The case can be used in business strategy, strategic management, entrepreneurship, family business, or international business courses. It is suitable for undergraduate and graduate students, including MBAs and EMBA's, with an emphasis on organizational strategy and decision-making. It would be beneficial for students with some experience in strategic analysis, as it broadens their understanding of dynamic markets. However, the case also benefits beginners exploring real-world challenges in rapidly evolving industries like foodservice. Ideally, the case should be presented in the middle or toward the end of a course on strategy or business innovation.

Case Synopsis

In October 2024, Pablo Luna, Chief Operating Officer of Carne Asada Kitchen (CAK), a family-owned chain of eight quick-service Mexican restaurants in Guadalajara, Mexico, faces a 10% revenue drop amid operational inconsistencies and market shifts. Founded in 1970 by his parents, Carlos and Lily Luna, CAK emphasizes traditional grilled meats, a homey atmosphere, and simple service, but struggles with inconsistent food quality, outdated paper-based ordering, non-eco-friendly packaging, and resistance to digital trends like QR codes and delivery apps. With revenues at approximately \$4.8 million USD through September and a declining 3.8-star rating, Pablo must bridge his father's traditional vision with modern demands for standardization, personalization, and sustainability in a competitive industry growing at 11% annually. The central challenge lies in modernizing operations and innovating to meet rising consumer expectations for digitalization and eco-friendly practices, while preserving the family legacy amid fierce competition from chains like Chipotle.

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GENEXUS: TO SELL OR NOT TO SELL ... THAT IS THE QUESTION

Ana Gabriela Marana Mestre, UCU Business School
 Florencia Manrique Barreto, UCU Business School
 Javier J. O. Silva, UCU Business School & UdeSA Business School (faculty supervisor)
 Juan J. Moreno, UCU Business School (faculty supervisor)

Case Objectives and Use

This case is intended for use in MBA or executive education programs, in courses dealing with Strategy or Corporate Governance. It focuses on analyzing the selection and execution of a growth strategy, emphasizing the impact on purpose and culture. All of this is framed within the founder's dilemma regarding the continuity of the company. Unlike other M&A cases, the emphasis here is on evaluating inbound acquisition offers and their strategic implications, rather than exploring acquisition targets.

The purpose of this case is for participants to evaluate which growth strategy to adopt in a market overheated by high competition and demand. Participants are expected to examine the alternative of continuing with organic growth or shifting toward an inorganic growth strategy through the sale of the company. To do so, they must debate the potential impacts of each alternative on the company's purpose, culture, and strategic execution.

This case has three main learning objectives:

- Identify a company's growth strategies and its competitive advantages.
- Analyze the execution of the strategy in relation to its influence on purpose and culture.
- Evaluate growth alternatives within the context of the founder's dilemma, to ensure the continuity of the company—and make a decision.

Case Synopsis

GeneXus was a pioneer in creating an Artificial Intelligence-based solution for the automatic development and maintenance of software. As one of the first software exporters in Uruguay, by 2021 the company had a presence in more than 50 markets, with a focus on Latin America and Asia. The case is set at a time when the demand for IT services was booming due to the pandemic. GeneXus, still owned by its founding partners Nicolás Jodal and Breogán Gonda, received multiple acquisition offers.

Jodal, the company's CEO, was considering three alternatives:

- Sell to a U.S. product-based company that shared GeneXus's mindset and generated approximately USD 400 million in revenue.
- Sell to an Argentine services company that did not share its mindset but did share its culture, with revenues of USD 1 billion.
- Reject the offers and seek another path for the company's growth and succession.

Under pressure from the potential buyers, a response was expected the following week. While preparing for a second meeting with his partner Gonda—who did not support selling—Jodal grappled with a series of concerns. Would the sale ensure the company's continuity or put at risk everything they had built? How could they overcome the barriers to accessing large global customers? Would they be able to retain talent in an overheated labor market? What would the future roles of Jodal and Gonda look like?

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 2025, Newport Beach, California, USA. October 17-18, 2025. All rights are reserved to the authors and NACRA. © 2025 by Ana Gabriela Marana Mestre and Florencia Manrique Barreto, supervised by Javier J.O. Silva & Juan J. Moreno. Contact person: Javier Silva, UCU Business School - Uruguay, javier.silva@ucu.edu.uy

NETFLIX: THE BATTLE AGAINST SLEEP

Enrique Chamas, Las Condes University ESE Business School
Ethel Pis Diez, Austral University

Case Objectives and Use

The core teaching goal of the case is to analyze the reasons behind Netflix’s success over Blockbuster, the evolution of its business model innovations, the application of the Blue Ocean strategy, its strategic flexibility, and its ability to adapt to shifting competitive dynamics and changing consumer preferences. The case also invites students to evaluate how emerging technologies—particularly generative artificial intelligence—may reshape these strategic alternatives by accelerating content production, transforming user experiences, and raising new questions about creativity, authenticity, and long-term differentiation.

The insights students will develop as a result of preparing and discussing this case include: the ability to perform a strategic analysis of rapidly evolving technology industries using frameworks such as Porter’s Five Forces; the capacity to distinguish and design business model innovations (whether incremental or transformational) in highly disruptive contexts; the strategic mindset to craft value propositions that generate new demand using Blue Ocean Strategy principles; and the skill to formulate robust strategic alternatives in the face of technological change, new entrants, and substitutes, with an eye toward long-term business model sustainability.

Based on our experience, this case is particularly well-suited for participants in Executive Education programs, Executive MBA, MBA, and graduate-level business programs.

Case Synopsis

The case is set in early 2025. The protagonists are Reed Hastings, the visionary founder of Netflix, and Greg Peters, the company’s Co-CEO. This case follows Netflix’s evolution from its disruption of Blockbuster in the late 1990s to its rise as the global leader in streaming and original content. By 2025, however, the company faces a saturated and highly competitive landscape, dominated by ecosystem players such as Disney, Amazon, and Apple, as well as new platforms like TikTok and video games that capture consumer attention in different ways.

Reed Hastings and Greg Peters must decide what kind of company Netflix should become to sustain growth and autonomy in the attention economy—while avoiding the fate of Blockbuster, whose downfall once created Netflix’s opportunity. Strategic options include building deeper content and technology capabilities, partnering to share risks, or platformizing. Generative AI cuts across all three, with potential to accelerate production, reshape user experiences, and challenge creative integrity.

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**SCALING AGAINST THE GRAIN:
LASENTA LEWIS-ELLIS AND LLE CONSTRUCTION GROUP**

Raquel M. R. Thoms, Benedict College
Chantil Wright-Galloway, Benedict College
Melvin Miller, Benedict College
Tracy Dunn, Benedict College

Case Objectives and Use

This case is designed for advanced undergraduate and MBA courses in strategic management, entrepreneurship, diversity in business, and executive education programs focused on leadership and growth under constraint. It is best positioned mid-to-late semester and can serve as a capstone integration case, once students have a firm grasp of core strategic frameworks. The case examines strategic decision-making for a minority-owned construction firm navigating systemic barriers, capital constraints, and growth opportunities. Students will gain insights into resource allocation under constraint, the intersection of race, gender, and entrepreneurship, mission-driven strategy, alternative financing, and industry-specific challenges in construction. Through analysis and discussion, students will develop skills in critical thinking, stakeholder management, and strategic planning within under-resourced and structurally inequitable environments.

Case Synopsis

This case examines the strategic challenges facing Lasenta Lewis-Ellis, founder and CEO of LLE Construction Group, as she navigates growth decisions for her Black woman-owned commercial construction firm. Despite achieving \$2.4 million in annual revenue with 20% profit margins, Lewis-Ellis confronts a fundamental paradox: strong business performance coupled with persistent systemic barriers to capital access and traditional growth opportunities.

Set in April 2024, the case captures a critical decision point following yet another loan denial, for a modest \$150,000 line of credit from her bank. This moment crystallizes the tension between individual business success and structural exclusion that defines minority entrepreneurship in capital-intensive industries.

Students must evaluate five strategic growth options while grappling with how intersectional identity, systemic barriers, and resource constraints shape entrepreneurial decision-making. The case provides rich material for examining strategic planning under uncertainty, alternative financing strategies, and the complex relationship between personal mission and commercial imperatives.

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**SOLO FUNDS: PEER TO PEER LENDING AT THE EDGE OF INNOVATION -
A MISSION TESTED BY REGULATION**

Katayoon Beshkardana, Morgan State University
Haesang Park, Morgan State University
Frederick Rice, Morgan State University
Nicholas Fletcher, Morgan State University

Case Objectives and Use

This case study aims to explore how a mission-driven minority-led fintech company navigated intense scrutiny from state regulators while staying true to its core purpose: expanding financial access for underserved communities. Instead of retreating or abandoning their core mission, the company's leadership took a proactive and strategic approach to navigate the crisis. They restructured internal compliance processes, engaged with policymakers and regulators, and mobilized industry advocacy efforts to influence emerging fintech regulation. At the same time, they made deliberate operational adjustments that would allow the business to continue serving its target population while reducing legal exposure. Through real-world decision-making under legal pressure, students will examine how leadership at the company level managed to strategically defend and refine its business model amid regulatory ambiguity, mounting investigations, and a fast-evolving compliance landscape. Students will analyze how the company balanced legal risk mitigation with mission preservation, and how it leveraged advocacy, legal advice, and strategic foresight to weather scrutiny without caving under the pressure of legal threats. The case focuses on the company's ability to adapt without compromising its values, providing a rich context for learning about crisis management, strategic pivots, advocacy, and innovation under legal uncertainty. This case is ideal for advanced undergraduate and MBA-level students across multiple disciplines. It is particularly suited for courses in Strategic Management, Social Innovation and Entrepreneurship, Business Law, and Finance. Its interdisciplinary nature makes it valuable to students interested in understanding how firms make principled yet practical decisions under pressure, especially in sectors with ambiguous or emerging regulatory frameworks.

Case Synopsis

This case tells the story of SoLo Funds, a mission-driven black-owned fintech company that disrupted the subprime payday lending industry with a peer-to-peer lending model based on a unique optional fee structure using tips and donations. In 2023, the model faced regulatory scrutiny over its voluntary fee model, which some jurisdictions argued functioned like high-interest loans. State regulators in Connecticut, California, and the District of Columbia determined that SoLo's platform design and disclosures resulted in unlicensed loan-brokering and concealed finance charges that functioned like interest. Each jurisdiction resolved its action through a consent order or settlement. The orders required operational changes such as disclosure, product settings, reporting, and monetary remediation to affected consumers. For SoLo Funds, the practical path forward was proactive legal review, conservative treatment of optional charges, respect for consumer choice, and early cooperative engagement with regulators when concerns emerge.

The company has been exemplary in putting litigations behind and defending their innovative business model. This case is a successful example of how innovative firms can stay mission-aligned while navigating regulatory gray landscapes and grow their business.

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SUPPORTWORKS' SHIFTING GROUND IN THE FOUNDATION REPAIR INDUSTRY: IMITATION & CONSOLIDATION

Leif Lundmark, University of Nebraska at Omaha
Erin Pleggenkuhle-Miles, University of Nebraska at Omaha
Kaleb Heckens, Right at Home

Case Objectives and Use

This case is best suited for a class in strategic management at either the undergraduate or graduate levels. While the case can be used to teach both the external and internal frameworks, the direct imitation of Supportworks' value proposition makes this an ideal case for developing and refining students' ability to conduct internal analyses and interpret findings (i.e., VRIO analysis). Instructors will also find that the case can be used to explore the effects of a long-term (Supportworks) vs. short-term (Groundworks) strategic orientation on a company's time horizon, strategic goals and decision making.

Case Synopsis

As a pioneer in the residential foundation repair industry, Foundation Supportworks leveraged a Business-to-Business (B2B) model to provide dealers with the products, tools, and training needed to grow. Supportworks developed and manufactured innovative products to reinforce and stabilize residential foundations. Dealers agreed to conduct foundation repairs using only Supportworks' products and were granted exclusive rights to operate in their local market(s). Supportworks' support for dealers, however, extended well beyond simply manufacturing and providing products. Dealers in the network were also provided with free support for marketing, sales, customer support, accounting, human resources and management. Notably, revenue was generated exclusively through the markup of the products that Supportworks provided to the dealers in its network. As of spring 2025, the unique dealership model had proven successful with 130 dealerships in 49 states and 3 countries generating revenue of over \$110 million and gross profit of approximately \$40 million.

As is often the case in competitive markets success and growth invite competition. Groundworks, a fast-moving private equity backed company, had recently positioned itself as a direct competitor to Supportworks. Groundwork's strategy was to imitate nearly every component of Supportworks' business model whether it be the name of the company (Supportworks vs. Groundworks) the products (Smartjack vs. IntelliJack), and even Supportworks' sales and marketing. To complicate the issue, Groundworks had also begun to consolidate the industry by buying out dealers within Supportworks' own network. Groundwork's acquisition of Supportworks' dealers had resulted in tens of millions of dollars in losses. Moreover, Groundwork's vertical integration strategy had provided the company with increased economies of scale, a recognizable national brand, and diversified product offerings. Supportworks needed to adapt to the new competitive landscape while keeping its core values intact.

The central question presented in this case addresses: *How can Supportworks leverage its industry leading innovation, strong relationships with dealers, and extensive support services to build barriers of imitation and ensure future growth?*

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 2025 Conference, Newport Beach, California, USA, October 16-18, 2025. © 2025 by Leif Lundmark, Erin Pleggenkuhle-Miles, and Kaleb Heckens]. Contact person: Erin Pleggenkuhle-Miles, University of Nebraska at Omaha, 6708 Pine Street. Omaha, NE. erinpmiles@unomaha.edu.

THE DILEMMA OF UKRAINIAN CONSUMER LENDING SECTOR UNDER THE PRESSURE OF WAR AND DIGITAL TRANSFORMATION

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Case Objectives and Use

This case is designed for use in graduate-level courses such as Strategic Management, Crisis Management, Leadership, or Banking. It is appropriate for MBA, EMBA, and DBA students who are exploring how leaders navigate complex, high-stakes decisions under conditions of extreme uncertainty. The case challenges students to critically assess strategic options during significant crises, digital disruption, and organizational transformation. Students will develop skills in applying strategic frameworks (such as SWOT and PESTEL analysis), evaluating trade-offs between innovation and tradition, balancing business imperatives with ethical leadership responsibilities, and crafting actionable recommendations in volatile environments. Through discussion, students will strengthen their ability to lead transformational change, manage stakeholder relationships under pressure, integrate strategic concepts across disciplines, and design resilient business strategies in volatile environments.

Case Synopsis

The case revolves around Dmytro Polischyk, the Deputy CEO of the First Ukrainian International Bank (FUIB), who faces a critical decision regarding the future of the bank's consumer lending Points of Sales (POS) network amidst the challenges posed by technological advancements, global banking trends, and the ongoing geopolitical crisis in Ukraine. The case explores the strategic options available to Dmytro, including shutting down the POS network, gradually decreasing its size, retaining the entire network while developing digital solutions, or maintaining the status quo until the situation stabilizes. The case timeframe includes the period starting in January 2024 when it became necessary to implement changes and February 2025 when the last POS was eventually closed.

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