ABSTRACTS ONLY

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OUTSTANDING TEACHING CASES GROUNDED IN RESEARCH

SPECIAL ISSUE ON BUSINESS AT THE QUARTER-CENTURY

SOFY CARAYANNOPOULOS, SPECIAL ISSUE EDITOR

ERIC DOLANSKY, EDITOR

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CASE CONTENT

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

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

CASE FORMAT

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

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

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

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

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

INSTRUCTOR'S MANUAL

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

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

REVIEW PROCESS

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

DISTRIBUTION OF PUBLISHED CASES

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

MANUSCRIPT SUBMISSION

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

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

For questions, contact:
Eric Dolansky, Editor
edolansky@brocku.ca

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Faculty members can adopt cases for use in their classrooms and gain access to Instructor's Manual through one of NACRA's distribution partners.

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- **CCMP [Centrale de Cas et de Médias Pédagogiques]** (http://www.ccmp.fr)

If you want to use one of these distributors, but cannot find the CRJ case you want, contact the NACRA VP Case Marketing, William Wei, william.wei@algomau.ca, to see if we can have it added for you.

Textbook authors can also adopt CRJ cases for inclusion in their textbooks for a modest fixed royalty fee. Please contact the NACRA VP of Case Marketing for more information.

From the Special Issue Editor

As we reach the quarter-century mark, business is being reshaped by forces more powerful and fast-moving than at any time in recent memory. Artificial Intelligence (AI) has become the defining technology of our era: it offers the opportunity for efficiencies, the challenge of complexity and implementation, and the controversy of replacing human thought, action and touch. The companies that succeed in harnessing it will be those that treat AI not merely as a tool to automate tasks, but as a catalyst for rethinking how value is created, how decisions are made, and how work itself is organized.

Yet technology is only part of the story. A volatile political climate — marked by polarization, changing and unpredictable tariff policies, geopolitical fragmentation, and regulatory unpredictability — now shapes boardroom agendas as much as market trends do. Businesses must operate in an environment where international trade can shift overnight, supply chains are vulnerable to political shocks, and public trust is increasingly fragile. Adaptability is no longer optional; it is strategic armor.

Furthermore, organizations must develop not only technical resilience but cultural resilience, cultivating leadership that can navigate social divides, respond to policy swings, and maintain stability in the face of national and global unrest. The polarization, social divides, and challenging contrasts are also reflected in our organizations. The workplace itself is undergoing a transformation that extends far beyond hybrid schedules. Organizations are challenged daily to walk a tightrope between individual freedoms that are diametrically opposed. Corporate policy development has never been more complex and more necessary to ensure a productive and positive workplace.

All of the above issues are reflected in the outstanding cases in this special issue of the Case Research Journal. The intention behind this issue was to capture the unique challenges of this moment in time. Each of the six cases described below focuses on a different aspect of organizations, business, and decision-making in 2025.

In, "Gripping the Future: ODI's AI Crossroads in a Shifting Mountain Biking Industry," by Yufan Lin, Varun Garde, Alireza Yazdani, and Heather Wrixon, the owners of a growing business require students to explore the use of AI as a marketing tool. ODI, a specialty bike grip manufacturer, confronts an opportunity to reach a new but different market from its current customer base. The case explores how AI can be leveraged to improve customer service and marketing to diverse target markets. At the same time, it requires students to consider limitations of this technology for creating a social media tone and digital presence that reflects the company's character as an organization. This case casts light on the very real and challenging dilemma of where to use human contact versus artificial intelligence.

"Jamaican Journeys: Will these Rules Ensure Appropriate GenAI Use?" by Zohaib Qazi, Edward Walters, and Janis Gogan, wrestles with the opposite but equally controversial question of appropriate versus inappropriate use of AI tools. Instructors confront the challenge of enabling and encouraging the use of AI to enhance the quality of student output while trying to draw clear boundaries on where inappropriate use begins. While the case itself is in an educational setting, the insights and analysis are relevant to all organizations that deliver research, creative, and consulting services to clients. These organizations must ensure that the client is not receiving work that is incorrect, or that important insights have been completely AI-generated. As we leverage AI to improve efficiency in recommendation development, at what point are we presenting the work of an AI as original and chargeable work?

The negative consequences of digital innovation are explored in "Indigestion in Bleaksburg." In this case by David Chinn and Janis Gogan, technology enables more food orders through a university's dining program, which is great for increasing revenues. Customers love it because it provides a quick and easy ability to place their orders: no waiting in line! Or does it? Brian Grove, the decision-maker in this case, grapples with how to address frustrated consumers who find that order fulfillment is not as efficient as order placement. This case illustrates that digital innovation can have both negative and positive consequences. It requires students to evaluate the technical background as well as financial and operational context of an organization, and identify a solution that improves both customer experience and organizational performance.

A precursor to the above questions, and a critical component of succeeding in a fast-moving technological environment, is innovating and adopting the latest tools and approaches. This is the focus of "Charting Blue Skies: Jeppesen's Journey from Digital Innovation to Transformation" by Nasar um Minullah. Jeppesen, located in Frankfurt, Germany, faces a critical decision: could their current approach adapt to the challenges of emerging technologies like AI for integration into the existing and future product portfolio, or would it require a new innovation framework? The case requires students to examine digital transformation and evaluate its strategic outcomes and design team structures to enable the creation and adoption of innovation.

Moving to human resources challenges at the quarter century, "What's in a Title," by Chiajung Lin and Ashley Stebbins, explores conflict resolution, leadership, stakeholder management and policy development. Private school CEO Vincent Smith faces a challenging situation when Jayden Garcia, a sixth grader citing her religious beliefs as justification, repeatedly refuses to use the preferred pronouns of Mx. Riley Oliver, a nonbinary teacher. The case builds skills in managing diverse work environments and navigating ethical and legal considerations when the rights of one organizational stakeholder infringe upon another. In a situation where it appears that there is no solution that can satisfy all stakeholders, students must tackle the challenge of developing a policy that is flexible, inclusive and fosters respect. This case also gives them the opportunity to build conflict resolution skills to address the immediate situation.

The special issue would not be complete without a case on the shifting sands of international trade. In "Chunlei's U.S. Market Entry Strategy: Navigating Risks Through Scenario Planning," by Yufan Lin, Varun Garde, H. Erkan Ozkaya, Ashley A. Romero, Raiya Abi-Samra and Jared Oakley. Daniel Cao, founder and CEO of Chunlei, must determine how best to enter the US market with yumberries, a specialty and premium fruit. There is strong demand in the US for yumberries, but market entry is complicated by United States Department of Agriculture (USDA) rules that block simple export models. The case is reflective of new challenges in the quarter century because it also considers the tariffs and technology sanctions imposed on Chinese imports by the new US administration. This case incorporates the most recent challenges of international business and presses students to also build resilience and flexibility into their strategic decisions.

Businesses at this quarter century mark are being confronted by new and more complex challenges than they have in the past that make the 'right answer' more difficult than ever before. Balancing strong opposing forces will be key to success. Do you pursue new trade opportunities even at the risk of unpredictable and ever-changing trade regimes? Where is the line on appropriate and effective use of artificial intelligence? How do you ensure in-person activities are consistent with digital operations? How do we ensure employees and/or clients with diametrically opposed personal beliefs and values can happily co-exist? The collection of cases in this special edition reflects the diverse and unique challenges that lie ahead and provide valuable tools for training to address them.

I would like to thank the Case Research Journal and Eric Dolansky for the opportunity to serve as associate editor for this special issue. It's been a pleasure to work with authors and reviewers to develop cases and see how far they have come. Eric's guidance has been invaluable throughout the process, and I have learned a great deal about guidance and the art of case writing while working with him.

Sofy Carayannopoulos
Special Issue Editor

Editor's Note

Sofy Carayannopoulos has done an outstanding job with this special issue, often under challenging circumstances. This issue is coming out right on time, both in terms of planning and intention: it is being published right at the close of the first quarter of what some of us still consider to be the 'new' century. Though new situations, processes, regulations, and dilemmas emerge constantly, I have found it useful to reflect at the time of this milestone, and consider all that seems so new at this particular point.

The cases in this issue would not have been possible without Sofy, other members of the editorial team (especially Christina Tathibana, CRJ's editorial assistant, who applied her usual unending effort and hard work, and Meredith Woodwark, who stepped in on short notice for some of the manuscripts), the reviewers, and of course, the authors who submitted work. I have often said that it is the reviewers and authors who are the lifeblood of the journal. Editorial team members manage the process, but it is the authors and reviewers who do the work.

This is also, officially, the final issue of my tenure as editor, and I am very glad to end on such a strong issue that reflects the time in which it is written. As case researchers and instructors, we want to find effective, useful, up-to-date, and pedagogically powerful content for our classrooms, and this issue contains six tremendously valuable examples.

I will close this note as I always do: please send in your cases, please sign up to review, and please consider how you can participate in, and contribute to, the case research community. Though I will no longer sit in the editor's chair, as always, if you have questions, comments, or suggestions, please feel free to contact me at edolansky@brocku.ca.

Eric Dolansky, Editor
Case Research Journal

Abstracts Only

INFORMATION SYSTEMS

- *Information Systems*
- *Ethics*
- *Return to Equity*
- *New Ventures*

Jamaican Journeys: Will GenAI Help or Hurt Student Consulting Teams? 1

Zohaib Qazi, * Edward Walters, Virginia Tech and Janis Gogan, Bentley University [Virginia Tech, Blacksburg, VA 24060 zoqazi@vt.edu]

In August 2023 two instructors were finalizing a GenAI Primer to include in their syllabus for a Spring 2024 intensive Jamaica Journeys study tour course. They hoped the acceptable-use rules in it would deter students from misusing ChatGPT-4 (launched in March 2023), at a time when very little helpful guidance was available. Student consulting teams, in preparing marketing materials for Jamaican business clients, would be encouraged to use ChatGPT-4 as a virtual assistant. Were the acceptable-use rules reasonably clear and complete? Should some rules be edited to improve their clarity? Should any rules be removed or new rules added, to help students use this powerful GenAI tool ethically and effectively, while shielding their clients from harm? Beyond imposing rules, what else could the instructors do to encourage responsible and effective GenAI use during their course?

Intended Courses and Levels

As a digital innovation (DI), GenAI was a "double-edged sword" that reportedly benefited and threatened higher education (Van Slyke 2024). This IM supports use of the case in an undergraduate Digital Innovation or Intro to Information Systems course. Students will likely take interest in this case, since many students participate in study abroad or short study tour courses. The case may also support useful analysis and discussion in business ethics or education courses (if so, the instructor's manuals prepared for those courses would likely emphasize different theories and teaching approaches). In analyzing this case, students will consider how rules (i.e. formal controls) can encourage appropriate GenAI use, prevent foreseeable harm to stakeholders, and detect potentially harmful or unethical user or system behavior when it occurs. Instructors can also help students consider the broader applicability of responsible AI use in industries beyond academia.

Learning Objectives

- Identify primary stakeholders who can be positively or negatively affected by a given digital innovation (DI), implemented in a particular organizational context.
- Categorize and evaluate rules for acceptable DI use in the given context. Which rules would likely encourage appropriate use? Which would prevent problematic human use, and which would detect and penalize problematic use? For each rule that needs improvement, explain why, and describe proposed changes.
- For a given set of DI acceptable-use rules, explain why its set of rules is complete or incomplete, in light of criteria such as achieving an appropriate mix of formal and informal controls or controls for prevention, detection, and harm reduction, or automated versus human controls. If the set of rules is incomplete, suggest additional rules.

- Offer other suggestions for encouraging responsible DI use in the given context. Explain why each suggestion complements, replaces, or improves upon a set of rule-based controls.

DIGITAL INNOVATION

- *Digital Innovation*
- *Smart Devices*
- *Service Innovation*
- *Service Management*

Indigestion in Bleaksburg 15

David Chinn,* Virginia Tech and Janis Gogan, Bentley University [New Hall West 104A, 190 West Campus Drive, Blacksburg, Virginia 24061]

In mid-January 2024, the new director of Virginia Tech Dining Services in Blacksburg Virginia (nicknamed "Bleaksburg") inherited responsibility for problems associated with a popular mobile ordering app. Just before lunch and at other times of peak demand, many students placed their orders at about the same time (via the app, often while in class), then waited in too-long lines in dining halls to retrieve their meals. A severe and seemingly intractable staffing shortage and lower-than-expected sales complicated this problem, and in other bad news, Virginia Tech Dining Services fell off Princeton Reviews' Top Ten list of excellent college dining services. In April, the new director would need to update Virginia Tech's Board of Visitors as to steps already taken or planned, to continue to deliver award-winning food services, attract and retain staff, balance the budget, and restore Dining Services' stellar reputation.

Intended Courses and Levels

This instructor's manual provides guidance for discussing this case with undergraduates in a 100- or 200-level Introduction to Business Information Systems class (it is also suitable for a similar-level Intro to Business class, but those instructors may need further guidance on some technical issues in the case). Undergraduates can readily relate to the case situation, which involves unanticipated consequences associated with a popular digital innovation. The instructor's challenge is to help students shift from their tendency to see a situation like this from the customer's perspective to the managerial perspective, by helping them see that this mobile app (like most, if not all, digital innovations) was a double-edged sword that brought both benefits and challenges. Instructors can also help students see that some potential solutions to the long-lines problem were constrained by available cash and other operational and human resources issues. The complexity in this case also makes it suitable for discussion with MBA IS students.

Learning Objectives

- Explain how use of a specific digital innovation (DI) by an organization's customers can have both positive and negative consequences for customers and other stakeholders.
- Identify specific technical, financial, operational, and other factors that cause positive or negative DI outcomes and explain whether and how some of these factors interact.
- After evaluating the technical, financial, and operational feasibility of several options for solving a specific DI challenge, design a feasible and actionable solution.

- *Digital Innovation*
- *Digital Transformation*
- *Technological Innovation*
- *Organizing Innovation*
- *Agile Project Management*

Charting Blue Skies: Jeppesen's Journey from Digital Innovation to Transformation

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Nasar um Minullah,* EBS Business School, EBS University of Business and Law [RheingauStr. 1, 65375, Oestrich-Winkel, Germany (nasar-um.minullah@ebs.edu]

Jeppesen was an aviation navigation company founded in 1934. It started with publishing paper-based navigation charts that supported pilots during flights and gradually expanded to various other product categories in airline operations. Like a momentous transition of aviation industry from propeller to jet engines in 1950s, Jeppesen also evolved its innovation processes with the advancement of digital technologies and competitive forces. By early 2024, Marc Launer, Director of Product Incubation & Research, and Jens Schiefele, Director of Research & Cooperation, realized that they needed an overhaul of innovation processes. Building a three-phased innovation funnel involved tireless contributions from past and present team members over more than two decades. Technologies like AI, machine learning, and Mixed Reality represented major technological challenges for speed of innovation and product delivery. On the other hand, next-generation aircraft equipped with all the modern technologies, and Vertical Take-off & Landing aircrafts (VTOL) were the kinds of challenges at the interface of hardware and software. The aviation industry had been heavily regulated all around the world to maintain rigorous safety standards mandated by regulatory authorities like Federal Aviation Agency (FAA) of the USA. Facing such challenges, it was time for Launer and Schiefele to find out if reorganizing their innovation processes would help. They involved the team to indulge in a process of finding out the best alternative team configurations. The dilemma was to reconfigure the teams in a way that would be able to respond to fast-paced changes expected to be brought by increasingly sophisticated technologies.

Intended Courses and Levels

This case has applications across the discipline of technology and innovation management. It is also useful for aviation management programs. However, it has been specifically written for a course on Digital Innovation and Transformation, where it could be used alongside the specific topics of digital innovation, agile organizing for innovation, and the ensuing digital transformation of the organizations. The author uses this case after the lecture on those topics to demonstrate how digital innovation and transformation work in practice.

Primary Course:

1- Digital Innovation and Transformation

Course Variations:

2- Digital Strategy and Platforms
3- Technology and Innovation Management
4- Digital Transformation

This case is suitable for the following levels of students:
1. Final year undergraduate
2. MSc and MBA students
3. Executive Students

Learning Objectives

The case is aimed at engaging students to achieve the following learning objectives:

- Analyze and explain the interrelationships between digitization and digital innovation, and how these contribute to digital transformation.
- Analyze a real-world digital innovation journey and apply relevant concepts of digital transformation to evaluate strategic outcomes.
- Evaluate how agile values influence organizing processes for digital innovation by assessing alignment and impact on innovation effectiveness.
- Design and justify alternative team structures for organizing innovation, based on an analysis of the roles and dynamics of innovation teams.

HUMAN RESOURCE MANAGEMENT

- ***Human Resource Management***
- *Organizational Behavior*
- *Policy Development*
- *Conflict Resolutions*
- *Inclusion and Belonging*

What's in a Title 51

Chiajung Lin,* and Ashley Stebbins, Robert Morris University [6001 University Blvd, Moon Township, PA 15108-2574, lin@rmu.edu]

At PA Charter School, CEO Vincent Smith faced a challenging situation when Jayden Garcia, a sixth grader, repeatedly refused to use the preferred pronouns of Mx. Oliver, a nonbinary teacher, citing religious beliefs. After multiple incidents, Smith suspended Garcia for disrespect and class interruptions. Smith consulted with the school's head of human resources, the board president, and the school attorney to navigate legal and ethical considerations, including pronoun usage, First Amendment rights, potential liability, discrimination, and HR compliance. As he prepared for the next board meeting, Smith contemplated whether the school should develop a flexible, inclusive policy or take a more cautious approach, seeking a solution that fosters respect without escalating conflict. This case invites students to explore conflict resolution, leadership, stakeholder management, policy development, ethics, and organizational behavior in diverse work environments.

Intended Courses and Levels

This interview-based case is suitable for undergraduate and graduate courses in Human Resource Management (HR) or Organizational Behavior (OB), covering topics such as Diversity and Inclusion, Discrimination, Policy Development, and Conflict Resolution. Although this case can be introduced after covering legal regulations or workplace discrimination (for LO1/LO2), it is highly recommended to use it as a capstone assignment later in the semester. By then, students will be better prepared to engage with the more complex discussion questions related to policy development and conflict resolution (LO3/LO4). This approach ensures students have the foundational knowledge and analytical skills needed to propose inclusive practices, address identity-based conflicts, and apply relevant strategies. This case is also suitable for a higher-level elective course, such as Gender, Family, and Work, covering gender self-identity, discrimination, and conflict management at the workplace.

While business students may not directly relate to an elementary school setting, this case is highly transferable to HR or OB courses and other business contexts, focusing on policy development and conflict resolution. As future managers, business students will likely encounter similar situations in the workplace, where they will need to navigate issues of perceived disrespect (due to different values and perspectives), inclusion, and conflict resolution. The issue of pronoun usage is particularly pertinent, as more individuals choose to be addressed by different names, nicknames, honorifics, or titles. Understanding these dynamics is essential for fostering an inclusive workplace.

Learning Objectives

After completing this case, students should be able to

- Understand self-identity, perceived disrespect, and discrimination, and their impacts on individuals and group dynamics at work.
- Examine individuals' freedom of speech right (individual expression versus religious belief) in the situation in this case, considering legal and ethical frameworks.
- Develop inclusion policies to support respectful communication and diverse perspectives.
- Apply conflict resolution strategies and negotiation skills to address disagreements.

INTERNATIONAL BUSINESS

- *International business*
- *Strategic analysis*
- *Risk management*
- *Strategic alliances*
- *Decision making and problem solving*

Chunlei's U.S. Market Entry Strategy: Navigating Risks Through Scenario Planning 61

Yufan Lin,* California State Polytechnic University – Pomona, Varun Garde, Microsoft Corporation, H. Erkan Ozkaya, Ashley A. Romero, Raiya Abi-Samra and Jared Oakley, California State Polytechnic University - Pomona [3801 W. Temple Ave., Pomona, CA 91768, USA, yufanlin@cpp.edu]

In early 2025, Daniel Cao, founder and CEO of Chunlei, needed to decide how his company should enter the U.S. market for exotic fruits. Chunlei has built a strong reputation in China through its patented digitized greenhouse technology that enabled production of the premium yumberry. With growth in China slowing down, Cao had been on the hunt for its next phase of growth, and recent examples had shown the US to be a large and growing market for exotic fruits. Wanting to retain control over the end-product, Cao had ruled out simple licensing as a mode of entry. Now with Series C investors requiring an expansion plan at the upcoming board meeting, Cao faced the high-stakes choice of choosing between foreign direct investment (FDI) and joint ventures with potential U.S. partners (Calmei, Oishii, Harry & David). Each option entailed trade-offs in capital intensity, risk exposure, brand positioning, and technology control.

Regardless of the chosen mode, the expansion decision itself was of an existential nature for Chunlei, which was a resource-constrained medium sized company. For Cao this meant he needed to take a hard-nosed and well-analyzed decision based on his future outlook and risk appetite.

Intended Courses and Levels

The Chunlei Market Entry Scenario Planning case is designed for use in upper-level undergraduate courses focused on international business and marketing strategy. This case provides flexibility to address key concepts in strategic decision-making, market entry strategies, and scenario planning, making it suitable for both introductory and advanced strategy and international business courses.

- International Business Strategy: focus on market entry strategies and cross-cultural business challenges
- Marketing Strategy: emphasis on scenario planning and strategic decision-making.

Learning Objectives

This case is designed to help students develop an understanding of trade-offs in market entry planning, scenario analysis, and risk management, all within a technology-driven industry aiming for international expansion. Through analysis and discussion of Chunlei's market entry strategies, students will be able to:

- Apply the Resource-Force-Observer (RFO) & Efficiency-Resilience-Prominence (ERP) frameworks for International Market Entry Decisions
- Assess the advantages and disadvantages (i.e. trade-offs) of each international market entry modes under the ERP Framework, both qualitatively and quantitatively
- Identify and defend the best market entry mode based on qualitative and quantitative analysis.

MARKETING

- *Marketing*
- *ChatGPT*
- *Chatbots*
- *Digital transformation*
- *Customer experience*
- *Service management*

Gripping the Future: ODI's AI Crossroads in a Shifting Mountain Biking Industry **77**

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ODI Grips, a leader in high-performance mountain bike grips, faces a strategic decision following the post-pandemic cycling boom that expanded its customer base beyond core enthusiasts. With a small three-person marketing team, Vice President of Marketing Colby Young must choose between hiring a new marketing employee or piloting generative AI tools for content generation and customer support.

Hiring would directly address resource shortages but increase overhead costs. AI offers scalability and automation potential but requires careful consideration of risks including bias, brand consistency issues, and quality control. Young must establish appropriate guardrails while maximizing benefits.

This decision will shape how ODI navigates its expanded market presence while maintaining its reputation among traditional enthusiasts and effectively serving new recreational cyclists.

Intended Courses and Levels

This case is designed for upper-level undergraduate and graduate courses in Marketing Strategy or Marketing Management (including capstone courses addressing strategic marketing decisions), Digital Marketing, and Technology Management. It fits particularly well in courses exploring the strategic use of technology in marketing. The case provides a rich context for examining AI adoption within a small-to-medium enterprise (SME) marketing framework, making it suitable for MBA programs and advanced undergraduate classes focused on marketing management, digital marketing strategy, or innovation in business. Instructors can use this case to move beyond introductory discussions of AI. While accessible to students with basic marketing knowledge, the scenario pushes learners to conduct deeper strategic analysis. Students must apply marketing concepts to an emerging technology context: evaluating AI's role in customer engagement and competitive positioning. The case's blend of social media marketing, customer service management, and technology strategy makes it versatile for courses in marketing management or even IT management with a marketing emphasis.

The case challenges students to analyze the complexities of integrating AI into a brand founded on human connection, evaluating how ODI could meet growing demand efficiently without compromising quality, authenticity, and brand integrity. Ultimately, students have to weigh the trade-offs between operational efficiency and maintaining a personal touch, as ODI navigated this critical crossroads in its marketing strategy. By focusing on ODI's decisions around AI chatbots and AI-generated content, the case encourages an integrative discussion that spans marketing strategy, customer experience, and technology-driven innovation at both undergraduate and MBA levels.

Learning Objectives

The learning objectives for this case are as follows:

- Distinguish where generative AI vs. human expertise should lead ODI's marketing and support work, by building a task-allocation matrix (using "jagged frontier" framework) that weighs benefits and risks for both the firm and customers, including accuracy, service quality, legal exposure, and brand trust.
- Develop frameworks or criteria for implementing AI versus new-hire solutions in marketing (e.g. content creation, customer support), that preserve brand authenticity and service quality across customer touchpoints.
- Synthesize a comprehensive recommendation for either hiring an additional marketer or piloting generative AI that maintains ODI's brand voice and technical expertise while addressing capacity constraints.

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