

ABSTRACTS ONLY

VOLUME 45

ISSUES 2-3

SPRING/SUMMER 2025

CASE RESEARCH JOURNAL

**OUTSTANDING TEACHING CASES
GROUNDED IN RESEARCH**

ERIC DOLANSKY, EDITOR

**PUBLISHED BY THE
NORTH AMERICAN CASE
RESEARCH ASSOCIATION**

**IN PUBLICATION
SINCE 1980**



Outstanding Teaching Cases Grounded in Research

Volume 45 • Issues 2-3 • Spring/Summer 2025

Case Research Journal

Published by the

North American Case Research Association



NACRA

**NORTH AMERICAN CASE
RESEARCH ASSOCIATION**

Editor

**Eric Dolansky
Brock University**

Copyright © 2025 by North American Case Research Association, Inc. (NACRA)
All rights reserved.

Further reproduction by any means, electronic or mechanical, including photocopying and recording, or by any information storage or retrieval system must be arranged with the individual copyright holders noted.

Published quarterly by North American Case Research Association, Inc.

Cover design, Lisa Fahey, originables.com.

NACRA membership for individuals is US \$40. Subscriptions to the Case Research Journal are US \$85/year for North American subscriptions and US \$115/year for subscriptions sent outside North America.

To join, register and pay online at: <https://www.nacra.net/>

POSTMASTER: Please send address corrections to:

North American Case Research Association
Christina Tathibana, Editorial Assistant
Case Research Journal
crj.christina@gmail.com

Printed in the United States of America

10 9 8 7 6 5 4 3 2 1

ISSN 2328-5095

ISBN: 979-8-9902961-5-2

Editor

Eric Dolansky
Brock University

Associate Editors

Randall Harris, *Texas AM University – Corpus Christi*
Ram Subramanian, *Stetson University*
Meredith Woodwark, *Wilfrid Laurier University*

Editorial Assistant

Christina Tathibana, *University of Regina*

Editorial Board

William A. Andrews, *Stetson University*
Kathryn J. Aten, *Naval Postgraduate School*
Maria Ballesteros-Sola, *CSUCI*
Mary Barrett, *University of Wollongong*
Erica Berte, *Metro State University*
Heidi M. Bertels, *City University of New York*
Karen Boroff, *Seton Hall University*
Alva Butcher, *University of Puget Sound*
James Carroll, *Georgian Court University*
Sofy Carayannopoulos, *Wilfrid Laurier University*
Danielle Clark, *Hillsborough Community College*
Carolyn Conn, *Texas State University*
Clinton Daniel, *University of South Florida*
Michelle Demoss, *Stetson University*
Lisa Eshbach, *Ferris State University*
Deborah R. Ettington, *The Pennsylvania State U.*
Josep Franch, *ESADE Business School*
John E. Gamble, *Texas A&M - Corpus Christi*
Armand Gilinsky, *Sonoma State University*
Janis Gogan, *Bentley University*
Michael Goldman, *University of San Francisco*
Peter Goulet, *University of Northern Iowa*
Gina Grandy, *University of Regina*
Jane Gravill, *Conestoga College*
Randall Harris, *Texas A&M - Corpus Christi*
Sean Hennessey, *U. of Prince Edward Island*
Cynthia Ingols, *Simmons College*
Lynn A. Isabella, *Darden School of Business*
Olga Kandinskaia, *University of Limassol*
Anwar Khurshid, *Labore U. of Mgmt. Sciences*
Brooke Klassen, *University of Saskatchewan*
Anne T. Lawrence, *San Jose State University*
John J. Lawrence, *University of Idaho*
Derek Lehmborg, *North Dakota State University*
Nancy Levenburg, *Grand Valley State University*
Lynda Livingston, *University of Puget Sound*
Francisco J. López Lubián, *IE Business School*
Robert A. MacDonald, *Crandall University*
Charla Mathwick, *Portland State University*
Michael McCollough, *University of Idaho*
Terry McGovern, *University of Wisconsin Parkside*
Rebecca Morris, *Westfield State University*
Charles Mossman, *University of Manitoba*
Kyleen Myrah, *Okanagan College*
Margaret J. Naumes, *University of New Hampshire*
William Naumes, *University of New Hampshire*
Ken Ogata, *York University*
Kay Palan, *University of Alabama*
Juan M. Parra, *INALDE Business School*
Tia Quinlan-Wilder, *University of Denver*
Stephanie Raible, *University of Delaware*
Marlene Reed, *Baylor University*
Steve Risavy, *Wilfrid Laurier University*
Glenn Rowe, *Ivey School of Business, Western U.*
Marvin Ryder, *McMaster University*
Kathryn S. Savage, *Northern Arizona University*
Grishma Shah, *Manhattan College*
Colleen Sharen, *Western University*
Jeff P. Shay, *Babson College*
W. Scott Sherman, *Texas A&M – Corpus Christi*
Javier Silva, *IAE Business School, U. Austral*
Ram Subramanian, *Stetson University*
Erin Sullivan, *Suffolk University*
Linda E. Swayne, *U. North Carolina Charlotte*
Sonia Toson, *Kennesaw State University*
Susan White, *University of Maryland*
Meredith Woodwark, *Wilfrid Laurier University*
Vijaya N. Zinnoury, *University of Denver*

NACRA Officers 2024–2025

EXECUTIVE COMMITTEE AND BOARD OF DIRECTORS

President

Mike Annett
MacEwan University

Immediate Past President

Melanie Reed
Thompson Rivers University

Vice-President Programs

Clinton Daniel
University of South Florida

Vice-President Programs-Elect

Brooke Klassen
University of Saskatchewan

Vice-President Communications

Shreya Mishra
Birla Institute of Technology

Vice-President Case Marketing

William Wei
Algoma University

Treasurer

Kathryn Savage
Northern Arizona University (Ret.)

REPRESENTATIVES OF REGIONAL AND AFFILIATED ORGANIZATIONS

Canada (ASAC)

Meredith Woodwark
Wilfrid Laurier University

Mexico (ALAC)

Martha Elena Moreno Barbosa
Tecnologico de Moterrey Campus Puebla

Eastern U.S. (CASE)

William Naumes
University of New Hampshire (Retired)

Southeastern U.S. (SECRA)

Susan Peters
University of North Carolina

Southwestern U.S. (SWCRA)

Kendra Ingram
Southeastern Oklahoma State University

Society for Case Research (SCR)

Andy Borchers
Lipscomb University

Western U.S. (WCA)

Melanie Reed
Thompson Rivers University

Caribbean Case Researchers Association

Paul Golding
U Technology – Jamaica

International Case Research Association (ICRA)

William Wei
MacEwan University Business School

Directors at Large

Brooke Klassen
University of Saskatchewan

Ajoy K. Dey

Advisory Council Chair

John Varlaro
Johnson & Wales University

Advisory Council Vice Chair

Randall Harris
Texas AM University – Corpus Christi

Case Research Journal Editorial Policy

North American Case Research Association (NACRA)

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

Adopting *Case Research Journal* Cases for use in your classes

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

NACRA currently has agreements with the following distributors.

- **Harvard Business School Press** (<http://hbsp.harvard.edu/>)
- **Ivey Publishing** (<https://www.iveycases.com/>)
- **The Case Centre** (<http://www.thecasecentre.org/educators/>)
- **Pearson Collections** (<https://www.pearsonhighered.com/collections/educator-features.html>)
- **McGraw Hill Create** (<http://create.mcgraw-hill.com/createonline/index.html>)
- **Study.net** (www.study.net)
- **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 Editor

At the time of this writing, I have a submission in the review process at the Case Research Journal. Though I have published several cases in this journal, it has been a relatively long time since I submitted something, as my role as editor made this challenging in a couple of different ways. Therefore, as I reach the end of my term as editor, I have a new glimpse of the editorial and review process from the other side. And though our reviewers and associate editors put in a tremendous amount of work to make the cases in the journal as strong as they can be, I am reminded that it is no easy feat for authors, either.

There is no doubt that Case Research Journal is demanding; this is by design. You can't call yourself the top, most rigorous, and most scholarly journal publishing decision-focused cases without a high standard for what is accepted. At the same time, the process cannot seem impossible, or no one would begin it. There needs to not only be the possibility (or likelihood) of eventual publication, but a sense of progress with each round of review. I have often said that though CRJ's acceptance rate is typically around 20%, I would be very happy if every submission eventually made it to publication, due to the developmental ethos and collaborative nature of not only CRJ, but the case writing community as a whole.

This is something I need to consistently remind myself of as I take on the role of CRJ author for the first time in about five years. Though I have published elsewhere during this time, this journal was always my first choice due to the high standards, rigor, and wide distribution of published cases. With that, though, comes the frustration, disappointment, and challenge of an extensive review process. We all hope that the next time we hear from the editor or associate editor, the response will be a positive one. No one will complain if they unexpectedly receive a publication acceptance, or at the very least an indication of a large step in that direction. More often than not, for any journal review process, the news is more often "another R&R" than "it's done, good job." That's just the nature of the business.

What sets published CRJ authors apart from those that have not yet accomplished this is often persistence, more than experience, skill, or expertise. I submit my work to CRJ knowing full well that a lot will be asked of me, that I probably have (at least) three rounds of revisions ahead of me, and that the final result will be substantially different from the initial manuscript I sent in. I am looking for that, because I want the best possible version of my case to be eventually produced. What this requires, though, is that I persist, and not let the frustration at being asked to do more work turn into anger, not let the disappointment of not getting that acceptance turn into despair, and not let the challenge of getting my manuscript to where it needs to be become defeatism. I need persistence, to keep at it, to put in the time and effort to adequately respond to what is asked of me by reviewers and the editorial team.

The thing is: I believe the ability to persist is in all of us. Not everyone has the talent to easily write a compelling case narrative, or do in-depth quantitative analysis; not everyone has the expertise to draw on the right theories or link case information to an appropriate framework. These are often solvable problems, through collaboration, research, and a willingness to learn. It will always be, though, that some people have greater talent or skill for different tasks. Persistence, on the other hand, is not a skill; it is a decision to continue, provided you have the right resources (energy, time, support). If you need a case to go from submission to acceptance within four months, no amount of persistence will help without enough time to apply it. Know what you're getting into for any publication outlet, and make sure it is aligned with your own personal and professional situation.

The authors with work in this issue all persisted. They all received tough reviews, asking a lot of them, and they all had to change their work to align with journal standards and expectations. They did it, many

of them first-time CRJ authors, and now have a rigorous research publication to show for it. The cases included in this issue of CRJ include:

- “Purity Life: Perfecting the Perfect Order Rate,” by Fatih Yegul, Stephen Thomson, and Nathan Woodard. This case examines a decision faced by a distribution manager to improve accuracy in order fulfillment, thereby reducing the costs of returns and mistakes. Though this high-volume business only had an error rate of 0.5%, the large volume of shipments meant this was still a significant issue. Through the examination of the company’s operations and processes, as well as different options for improvements involving varying levels of investment, students will have the opportunity to determine the best way forward considering multiple variables, not only one.

- “To Launch or Not to Launch a Nonprofit, a Startup Decision Problem,” by Claudia Barrulas Yefremian. A middle-school teacher in Los Angeles, inspired by the challenges faced by his students, considers whether to leave his career to launch a not-for-profit organization focused on healthier eating and access to more nutritious food. He sketched out the costs involved, and different plans for launching the organization, but needs to better understand what might be involved, the likelihood of success, and the risks before making this decision.

- “Crafting the Future: Strategic Growth Decisions at Highland Brewing Company,” by Justin K. Kent, Tiberiu SV Ungureanu, and Mark O. Lewis. A family-owned brewery has gone through a rebranding and is, as of the time of the case, determining sources of new growth. Options include enhancing the on-site experience, a new product size, or expanding into the growing no- and low-alcohol market. Owner Leah Wong Ashburn considers the financial impact of these alternatives as well as the strategic fit of each.

- “Aer Cosmetics and the Sustainable Road to Success,” by Federica Rossetti, Nitin Kumar Singh, and Erin Byrne. In this case, an entrepreneur is fighting for the survival of her business. Paige DeAngelo launched sustainable-mascara business Aer Cosmetics while still a student, and her funding was coming to an end. In order for her business to continue, she needed to sell approximately three times as many units in the upcoming holiday shopping season as she had ever sold since founding. The first steps she is taking in this regard have to do with re-evaluating her target market and positioning, to best capture sales in this competitive market.

- “Innovakit: The Challenge of Seeking Funds to Scale Impact on Coffee Farms in Developing Countries,” by Luz Elena Orozco Collazos and Andres Jose Guerrero Alvarado. An organization that helped coffee farmers increase their effectiveness and efficiency, Innovakit in 2023 faced the challenge of growth not meeting investor expectations. As a social enterprise, Innovakit had both financial and impact goals, and balancing these was difficult. To fund further growth, new investment was needed, so the founders were considering bank loans, donations, crowdfunding, impact investments, and venture capital.

You can see from the above descriptions of the cases that this is a varied bunch, covering different topic areas (marketing, strategy, social enterprise, and operations), in organizations of different size (ranging from not-yet-existent to large), and with different learning objectives. One thing they all have in common is that the authors put in the time, effort, and work to persist through the review process, even when it was difficult and uncertain that the case would eventually make it. Many submissions to the journal start off strong; we want those to be stronger. Others start in a less-developed state, and though it might take more rounds of review to get to publication, we at the journal still want the destination reached.

Now, as I come to the end of my time on the editorial team, I will return the roles at CRJ where I started: author and reviewer. The important thing is that in this work I persist. I must not forget my thought process and critical eye, employed at a reviewer, when I am working as an author. Equally important, I must not lose sight of the author’s perspective when reviewing. In a recent conversation I

heard about the need for reviewers to not only highlight the areas in need of improvement, but to offer guidance and suggestions for completing them.

I strongly urge you to not only adopt the cases in this issue of CRJ in your own courses (where appropriate) but also to encourage your colleagues to do so. Also, do not stop at these five cases, because every issue of CRJ has great decision-focused teaching cases, spanning difficulty levels, disciplines, theoretical bases, industries, and contexts. You will be able to find many that suit your students, course, and program. As always, if you have any questions or if you think I can be of assistance, please feel free to contact me at edolansky@brocku.ca.

Eric Dolansky, Editor
Case Research Journal

Abstracts Only

ENTREPRENEURSHIP

- *Entrepreneurship* **To Launch or Not to Launch a Nonprofit, a Startup Decision** 1
- *Entrepreneurial Financing* **Problem**
- *Nonprofits* Claudia Barrulas Yefremian,* California State University Long Beach [1250
- *Business Model Canvas* Bellflower Blvd, MS-8502 Long Beach, CA 90840,
- *New Ventures* cl.barrulasyefremian@csulb.edu]
- *Decision Analysis* This case follows Brent Walmsley, a middle-school teacher in East Los Angeles, who considered leaving his stable career to launch a nonprofit tackling childhood obesity and food insecurity. Inspired by his 75-pound weight loss and years teaching in disadvantaged neighborhoods, he saw how poor nutrition affected his students, and thus envisioned an organization dedicated to education, advocacy, and community engagement. Lacking experience in management and fundraising, Walmsley identified four options: pursue the nonprofit full-time, pilot it while teaching part-time, collaborate with an existing nonprofit, or remain a teacher and advocate within the school system. Each option carried trade-offs in risk, resources, impact, and sustainability. The case challenges students to analyze these paths and decide what Walmsley should do.

Intended Courses and Levels

This case is suited for core or early-stage courses in entrepreneurship and new venture creation, as well as introductory courses in nonprofit management. The case illustrates and highlights how early-stage nonprofit ventures must balance mission-driven goals with operational and financial discipline. The case works well when placed early in the semester, covering the first steps of new venture formation, and it is most effective after students have been introduced to the Business Model Canvas (BMC). Instructors can use it for an in-class discussion, a written assignment, or even an exam case, depending on course objectives.

Learning Objectives

After studying this case, students will be able to:

- Identify and evaluate the entrepreneurial opportunity presented by the nonprofit idea.
- Develop a business model for a nonprofit startup.
- Assess the feasibility of launching a nonprofit using financial and strategic criteria.
- Formulate a structured recommendation outlining actionable steps for launching a nonprofit venture.

MARKETING

- **Marketing** **Aer Cosmetics and the Sustainable Road to Success** 11
- *Digital Marketing Strategy*
- *New Ventures*
- *Sustainability*

Federica Rossetti*, Nitin Kumar Singh, and Erin Byrne, Rider University
[2083 Lawrenceville Rd, Lawrenceville, NJ 08648, frossetti@rider.edu]

In October 2024, Paige DeAngelo, founder and CEO of Aer Cosmetics, faced a critical decision about how to market her young sustainable beauty brand during the upcoming holiday season. After launching a refillable, waste-free mascara earlier that year, Aer had generated strong engagement on social media but limited sales. With her company preparing to exit a university business incubator and operating costs set to increase, DeAngelo needed to determine how to convert awareness into purchases and reach a minimum sales target to keep the venture viable. The case asks students to evaluate alternative digital marketing strategies, including sustainability-focused messaging, a mother-daughter gifting campaign, and a small in-person pop-up test. The case highlights challenges related to digital marketing, target market selection, and early-stage venture growth in the sustainable consumer products sector.

Intended Courses and Levels

This case study was designed for an undergraduate digital marketing class, and for a marketing management class. This case should either be taught in the middle or at the end of the semester, after students had the chance to learn about the customer persona, the customer journey, and social media strategies. The case should be taught to upper-year students who have taken at least one marketing class.

Learning Objectives

- Diagnose the root causes of weak early-stage sales in a startup environment.
- Apply Segmentation, Targeting, and Positioning (STP) to refine a customer focus.
- Evaluate a founder-led brand and the role of authenticity in early marketing.
- Design a digital marketing strategy using limited budget and data.
- Use the AIDA model to structure messaging and conversion tactics across platforms.
- Develop and defend a marketing recommendation using evidence and counterargument logic.

OPERATIONS MANAGEMENT

- **Operations Management** **Purity Life: Perfecting the Perfect Order Rate** 25
- *Logistics*
- *Order Accuracy*
- *Process Improvement*

Fatih Yegul*, Stephen Thomson, and Nathan Woodard, Conestoga College
[299 Doon Valley Drive, Kitchener, Ontario N2G 4M4, Canada,
fyegul@conestogac.on.ca]

- *Warehouse Operations*
- *Incentive Systems*
- *Human Factors*

Purity Life, Canada's largest distributor of natural health and beauty products, prided itself on its flexibility and customer service. Yet persistent errors in order processing (e.g. mispicks, damages, missing items) were eroding its perfect order rate and triggering costly credits to customers. While the error rate appeared small, the financial and operational impact was significant given the company's high shipment volume. With the VP of Operations expecting recommendations within weeks, Distribution Manager Nathan Woodard faced a critical decision: should he advocate for expensive automation technologies with uncertain ROI, implement low-cost verification systems that could slow productivity and affect employee incentives, or continue pursuing incremental process improvements? Each option came with trade-offs in terms of cost, efficiency, and morale. Woodard needed to weigh these alternatives carefully to protect profitability, sustain customer trust, and uphold Purity Life's reputation for operational excellence.

Intended Courses and Levels

This case is suitable for undergraduate and graduate-level courses in:

- Supply Chain Management
- Logistics and Distribution Operations
- Operations Management
- Business Analytics
- Organizational Decision-Making

It is especially well-suited for courses that explore warehouse operations, human-system interaction, and the use of data to drive continuous improvement. By studying this case, the students can contemplate the issues experienced in modern warehouse operations and the technologies used in warehouse management. The case includes datasets and data analysis exercises that would make it ideal for courses that teach data analytics methods using tools such as MS Excel, Power BI, or Tableau.

Learning Objectives

By analyzing the challenge Purity Life (PL) faced and how they responded or should have responded to that challenge, students will be able to:

- Evaluate the concept of the perfect order rate and its key performance metrics (e.g. order accuracy, line accuracy, turnaround time) to understand their role in operational excellence and customer satisfaction.
- Apply data analytics techniques using tools such as Excel, Power BI, or Tableau to identify trends, quantify error rates, and assess the financial impact of operational inefficiencies.
- Examine the critical components of warehouse operations (picking, packing, and shipping) to identify root causes of errors and inefficiencies, and thus propose process improvements or technological interventions.
- Compare and contrast alternative strategies for improving order accuracy and efficiency, considering trade-offs between cost, speed, and quality, and recommend a course of action that supports continuous improvement and long-term operational performance.

SOCIAL ENTREPRENEURSHIP

- *Social Entrepreneurship* **Innovakit: The Challenge of Seeking Funds to Scale Impact on Coffee Farms in Developing Countries** 51
- *Growth Acceleration*
- *Financing Options*
- *New Ventures*
- *Impact Investing*

Luz Elena Orozco Collazos,* and Andrés José Guerrero Alvarado,
Universidad de los Andes-School of Management [Calle 21 1-20, Bogotá,
Colombia, 111711, luorozco@uniandes.edu.co]

Innovakit, a social enterprise that made tools for coffee production and taught growers in Colombia how to use them to improve productivity, faced the challenge of growth. Innovakit's social impact and the organic growth during recent years endorsed this objective. The company could continue to grow using its cash flow. However, Hugo López and Silvana Yandar, the founders, had the perspective to accelerate growth by using external funds. The local economic situation also pressured this decision. They had different views on how to grow. López identified several promising opportunities for Innovakit that required venture capital. Yandar, however, believed it was vital to protect Innovakit's original purpose and philosophy, and preferred to maintain control of the business by using debt to fund growth. The team needed to decide on the source of additional funds, considering venture capitalists, bank loans, donations, impact investment, or crowdfunding.

Intended Courses and Levels

This case was designed for use in entrepreneurship courses across undergraduate, graduate, and executive-level education. It will help students develop knowledge and skills related to impact-driven businesses and the challenges these businesses face as they grow. The case explores how to determine the best funding source for a socially and environmentally focused business like Innovakit, to achieve accelerated growth. The discussion section includes an analysis of accelerated growth as a goal for this type of business, and the implications of accelerated growth for the business itself and its entrepreneurs.

The case may also support courses on social entrepreneurship and social innovation. The case includes a level of detail that can be used to understand how social value may be created. It is suggested that the case be applied at the end of the mentioned courses, because the search for financing sources aligns with the close of the venture design phase and the beginning of the preparation for the implementation.

It should be noted that the case focuses on financing sources while more advanced financing aspects are not tackled. These constitute a step ahead in a regular course. Thus, the case is appropriate in the introductory phase of those graduate courses with a financial focus.

Entrepreneurship students need an understanding of business models and value propositions to analyze this case. In addition, although the analysis is not financial, students should have basic knowledge of business finance, including risk, debt, assets and equity, cash flow and profitability.

Learning Objectives

After analyzing the case students will be able to:

- Analyze the elements and relationships that make a social and environmental impact-focused business feasible.

- Understand organic and accelerated growth, and their implications for an impact-driven social and environmental business.
- Formulate and evaluate critical growth drivers (entrepreneur, business model, and organization) in relation to potential funding sources and their requirements.

STRATEGIC MANAGEMENT

- | | |
|---|---|
| <ul style="list-style-type: none"> • <i>Strategic Management</i> • <i>Strategic Growth Decisions</i> • <i>Brand–Strategy fit</i> • <i>Financial Analysis</i> | <p>Crafting the Future: Strategic Growth Decisions at Highland Brewing Company 71</p> <p>Justin K. Kent,* Tiberiu SV Ungureanu, and Mark O. Lewis, Appalachian State University [416 Howard St., Boone, North Carolina, 28608-2089, kentjk@appstate.edu]</p> |
|---|---|

Leah Ashburn, CEO of Highland Brewing Company, was evaluating three mutually exclusive growth initiatives: expanding on-site customer experiences, introducing 19.2-ounce tallboy cans, or launching a non-alcoholic beverage line. The analysis included projected revenues, costs, and capital investments for each option, along with qualitative considerations related to brand fit and operational capabilities. The CEO, needed to assess the financial attractiveness of each alternative, understand the strategic trade-offs involved and determine which option best aligned with the firm’s capabilities and long-term direction. Recent industry trends, including declining growth in the craft-beer industry and increased competition increased the importance of choosing the right growth path.

Intended Courses and Levels

This case is designed for the business-level strategy module of undergraduate capstone courses in strategic management and can also be used effectively in MBA core sections. It fits best at the point in the syllabus where students have already practiced external analysis (e.g. Five Forces), internal analysis (e.g. VRIO and value-chain), generic competitive positioning (differentiation, cost leadership, blue-ocean, or hybrid), and basic financial evaluation (e.g. net present value). At this juncture, the case challenges students not only to draw on these individual frameworks but to weave them together — applying VRIO and NPV analyses in concert — and to recognize that no single tool is sufficient to make a comprehensive strategic recommendation. For instructors using Rothaermel’s Strategic Management (6th edition or newer), this moment corresponds to the session immediately following Chapter 5, “Business Strategy: Differentiation, Cost Leadership & Blue Ocean.” At this juncture, the case challenges students to integrate their analytical tools to decide among mutually exclusive growth paths for a single-business firm under a strict constraint that the firm can pursue only one of them in the near term.

The case may also be used in Entrepreneurship, Family-Business, and Craft-Beverage electives, where it highlights second-generation leadership, resource constraints, and experiential complements as levers of competitive advantage.

Learning Objectives

- Assess and articulate a firm’s current strategy and internal drivers of success. Students will be able to

identify a company's current business strategy and describe how specific resources, capabilities, and competencies contribute to competitive advantage using frameworks such as RBV and VRIO.

- Evaluate the strategic fit between internal capabilities and new growth options. Students will be able to assess the alignment of internal strengths with proposed strategic initiatives using fit analysis (e.g. Strategic Fit Matrix, Core Competency Framework).
- Integrate financial analysis with strategic evaluation to support decision-making. Students will be able to conduct or interpret basic financial comparisons (e.g. cost estimates, revenue forecasts, breakeven points) and assess how these support or challenge strategic priorities.
- Identify and apply relevant decision criteria for evaluating strategic options. Students will be able to establish decision-making criteria such as strategic fit, growth potential, customer value, and execution feasibility to structure complex strategic choices.
- Apply a structured comparative analysis to prioritize strategic options. Students will be able to use a strategic decision matrix or a weighted scoring tool to evaluate and rank alternative growth strategies based on defined criteria.
- Develop and defend a data-informed strategic recommendation. Students will be able to formulate a strategic recommendation supported by evidence and justify their decision using both qualitative and quantitative analysis.



NACRA

North American Case Research Association

NACRA is a collaborative organization of approximately 500 researchers, case writers and teachers, mostly in the business disciplines, who support each other's research and writing efforts.



ISBN 979-8-9902961-5-2



9 798990 296152