NACRA Officers 2016–2017

EXECUTIVE COMMITTEE AND BOARD OF DIRECTORS

President
John Gamble
Texas A&M University - Corpus Christi

Immediate Past President
Randall Harris
Texas A&M University - Corpus Christi

Co-Presidents - Elect
Kathryn Savage
Northern Arizona University

and
Jeffrey P. Shay
Washington & Lee University

Vice President, Case Marketing
Susan Sieloff
Northeastern University

Vice President, Membership
Brent David Beal
University of Texas at Tyler

Vice-President Programs
Chris Cassidy
Sam Houston State University

Co-Presidents - Elect
Kathryn Savage
Northern Arizona University

and
Jeffrey P. Shay
Washington & Lee University

Vice President, Communications
Lisa Eshbach
Ferris State University

Secretary/Treasurer
A. Kay Guess
Samford University

Editor, Case Research Journal
John Lawrence
University of Idaho

REPRESENTATIVES OF REGIONAL AND AFFILIATED ORGANIZATIONS

Canada
Gina Grandy
University of Regina

Mexico (ALAC)
Adriana Ramirez Rocha
Tecnológico de Monterrey

Eastern U.S. (CASE)
William Naumes
University of New Hampshire (Retired)

Southeastern U.S. (SECRA)
Susan Peters
Francis Marion University

Southwestern U.S. (SWCRA)
Joe Kavanaugh
Sam Houston State University

Society for Case Research (SCR)
Craig Davis
Ohio University

Western U.S. (WCA)
Michael Valdez
Fort Lewis College

Directors at Large
Gina Grandy
University of Regina
Joe Kavanaugh
Sam Houston State University
U. Srinivasa Rangan
Babson College

Advisory Council Chair
William Naumes
University of New Hampshire (Retired)

Advisory Council Vice-Chair
Tim Edlund
Morgan State University
Case Research Journal Editorial Policy
North American Case Research Association (NACRA)

Case Content

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 (e.g., interviews with key decision-makers in the organization; interviews with stakeholders affected by an organizational decision, issue, or problem; participant observation; review of primary materials, such as legal proceedings and congressional testimony) supplemented by appropriate secondary research (e.g., journalist accounts). Exceptional cases that are analytical or descriptive rather than decision-focused will be considered when a decision focus is not practical. 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.

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.

Multi-media cases or case supplements will be accepted for review. Contact the editor for instructions.

Instructor’s Manual

Cases must be accompanied by a comprehensive Instructor’s Manual that includes at least the following elements:

1. A brief (one-page maximum) synopsis of the case.
2. Identification of the intended course(s) and levels, including the case's position within the course and its specific learning objectives.
3. Theoretical linkages, including 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.
4. Suggested teaching approaches or a teaching plan, including the expected flow of discussion and key questions, role plays, debates, use of audiovisuals or in-class handouts, a board plan, etc. Authors are strongly encouraged to classroom test a case before submission so that experience in teaching the case can be discussed in the IM.
5. Assignment questions for student preparation, accompanied by a full analysis of each question that demonstrates application of relevant theory to the case. This discussion may highlight analytic points that might be noticed only by the best students.
6. 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 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 authors' identity during the review process.
7. If appropriate, an epilogue or follow-up information about the decision actually made.

Review Process

All manuscripts (both case and 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. 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.

CASE FORMAT

Cases and articles submitted for review should be single-spaced, with 12-point font and 1" margins. Published cases are typically 8-12 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 in endnotes; otherwise, a "Reference List" can be included at the end of the case in APA format. Footnotes may be used for short explanations when including these explanations in the body of the text would significantly disrupt the flow of the case.

The following notice should appear at the bottom of the first page of the manuscript:


It is the author'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.

MANUSCRIPT SUBMISSION

Submit the case manuscript and Instructor’s Manual in one Microsoft Word document via the NACRA Automated Case Submission and Review System (ACSARS): http://www.nacra.net/members. No author identification should appear on either the case or the Instructor’s Manual.

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 at the rate of U.S. $50 per year. See instructions on the above site.

For questions, contact the Editor

John J. Lawrence, Ph.D.
jlawrence@nacra.net
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](http://www.ivey.ca)
- [McGraw Hill Create](http://create.mheducation.com/createonline/index)
- [Pearson Collections](https://www.pearsonhighered.com/collections/)
- [Study.net](http://www.study.net)
- [The Case Centre](http://www.thecasecentre.org/educators/)
- [Xanedu Publishing](http://www.xanedu.com)

If you want to use one of these distributors, but cannot find the CRJ case you want, contact the NACRA VP Case Marketing 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.

---

**DOES YOUR LIBRARY CARRY THE CASE RESEARCH JOURNAL?**

North American library subscriptions are $75. North American library subscriptions should be sent to:

Lynn Southard, Assistant Editor
Case Research Association
7561-A Suffield Road
Stokesdale, NC 27357
llsoutha@uncg.edu
336-643-8048
From the Editor

Welcome to Volume 37, Issue 2 of the *Case Research Journal*. This issue features seven excellent cases that I am very excited to be publishing. Most of these cases fill real gaps in the available case literature and as such I anticipate they will be well received in distribution. The *Wildfang* case that leads off this issue provides students an opportunity to apply a Customer Lifetime Value analysis approach to assess competing business models that might be used to drive company growth. Subsequent cases cover equally compelling issues. The *Skateistan* case, which has an accompanying video component, looks at how to scale a social enterprise founded in Afghanistan that focuses on using skateboarding to empower young people. The *Is this for me?* explores how one decides whether or not to work in one's family’s business and fills an important pedagogical space in a family business course. The *Vetra* case considers the process of divestment as well as considers the challenges of valuing an oil and gas company where the company’s value is based largely on fixed term licenses to tap uncertain oil and gas reserves. The *Fintech* case considers how an organization that wants to use the cloud to host new services for its clients goes about selecting a cloud service provider. While there are a number of cases written from the perspective of the cloud service providers, there are very few cases that look at how companies buy services from these providers. The *Delta Plastics* case looks at a company trying, with limited success, to roll out a software product that complements its core plastic tubing irrigation product. The case explores how companies can drive adoption of innovations in challenging market conditions. The final case in this issue is a detailed telling of the *Wells Fargo* scandal where employees opened more than two million unauthorized accounts for customers. The case, based on senate banking committee and house financial services committee testimony as well as a company documents and selected secondary sources, allows students to consider how such wide spread unethical activity could have occurred as well as how the company’s new CEO might deal with the aftermath of the scandal.

As I was looking over the seven cases in this issue, one of the things that struck me (beyond the fact that these cases filled important gaps in the case literature) was how relatively quickly these cases moved through the review process. With one exception, all of these cases were accepted for publication within eleven months of their initial submission. The average turnaround time for those six cases was eight and a half months. As I look back at why these cases moved through the review process so quickly, two things stood out. First, six of the seven cases in this issue were first presented at case conferences – three at last year’s NACRA meeting in Las Vegas and three at meetings of the Western Casewriters Association. Cases that have been presented at case conferences prior to journal submission tend to fair better in the review process as they have been strengthened based on the feedback that those meetings provide. Second, the authors of the cases that appear in this issue turned revisions around within a few months’ time of receiving feedback. All too often I see cases with real potential languish with authors for six months to a year or more. Inertia sets in, author and reviewer enthusiasm wane and many of these cases never get published. Setting revisions aside without a specific plan for tackling them in the near term has derailed more than a few cases. So I encourage all of you to take the cases you are developing now to a case conference if you can – there are many excellent regional case conferences coming up in the spring of 2018 with submission deadlines either this fall or early 2018, and NACRA’s 2018 meeting will be back in Orlando for your longer term projects. Then strike while the iron is hot – commit to yourself to turn around your cases within two months of conference presentation and within three months of receiving feedback from journal reviewers.

I look forward to seeing many of you at our upcoming meeting in Chicago.

Sincerely
John J. Lawrence
Editor, *Case Research Journal*
BUSINESS MODEL INNOVATION AT WILDFANG

Wildfang, a retail women’s brand is three years into the lean startup of a largely ecommerce operation complemented by two brick-and-mortar retail shops. Wildfang’s executive team is involved in expansion planning and must address the question, “Which business model should be proposed for the expansion and where are the risks in that plan?” The case links the business model canvas (BMC) with customer lifetime value (CLV) modeling techniques to explore possible impact on the company’s growth strategy. Customer segment-level assumptions are used to analyze the CLV of two business model designs. A private label bricks-and-clicks model is contrasted with a pivot to a multisided platform. The canvas and CLV analysis serve as templates for scenario testing using a supplemental Excel worksheet that is provided to model these two business model options. The Instructor’s Manual offers suggestions for assignments as well as classroom discussion. The case is intended for an MBA or advanced undergraduate courses in marketing strategy, metrics, retail management, or entrepreneurship.

Instructor’s Manual Available from:
Charla Mathwick
mathwickc@pdx.edu

SKATEISTAN

As Oliver Percovich rode his skateboard on the streets of Kabul, Afghanistan, he was surprised by the children who wanted to take his board to ride themselves. Most of these children had never seen a skateboard. Percovich, a world traveler and part of the international skateboarding culture, realized this was a serendipitous opportunity and created Skateistan, a non-government organization (NGO). Skateistan opened a door for children—especially girls previously denied participation in sports and to uneducated children earning family incomes selling trinkets on the streets. To participate, attendance at educational and art classes were required and lessons in life skills and leadership development were taught. The program also developed relationships among the children across economic and social boundaries. As the program’s success grew, other organizations and cities wanted to bring Skateistan to their communities. Skateistan added facilities in Phnom Penh, Cambodia, Mazar-e-Sharif, Afghanistan, and Johannesburg, South Africa. Percovich saw Skateistan as an unexpected opportunity to advance change in closed and underdeveloped societies. While he wanted to see Skateistan grow, there were financial and staff constraints.
Expansion was predicated on the organization’s ability to scale effectively and create sustainability in revenue sources and in meeting staffing needs. In order to adequately respond to requests for developing more Skateistan programs, the question developed as to whether their current approach to scaling was the best model and if not, what approach to scaling should Skateistan take to meet their goals? Which business model would ensure the success of existing and future programs?

Instructor’s Manual Available from:
Nancy Ellen Dodd
nancy.dodd@pepperdine.edu

**IS THIS FOR ME?**

**CAREER DECISION MAKING IN A FAMILY BUSINESS**

Members of family business families are often concerned about career decision-making among members of the next generation. Chief among the concerns is the question: Are off-spring joining out of a sense of familial duty or sincere interest? Recent research has suggested obligation may lead to children entering their family’s business and has also predicted that desirable behaviors, such as working above and beyond, may not follow. This case provides an opportunity to explore the decision-making process of John Nguyen, who has entered the family business but isn’t sure he has made the right choice. In the case, John is at a crossroads as he has been offered a promising career opportunity from a leading technology firm, TechX. The TechX job has a number of things to recommend it but is especially attractive because John’s educational background and professional experience have been in the tech industry. In contrast, his family’s business is in the vocational training industry. While members of his family see areas where he can contribute, John is less certain that a job within the family business fits with his skills and interests. The case provides an opportunity to apply theories from family business and management research to understand factors that influence career decision making within a family business. The case is intended for graduate or undergraduate courses in family business or human resource management.

Instructor’s Manual Available from:
Holly Slay Ferraro
ferraroh@seattleu.edu

**DIVESTING VETRA, S.L.**

In late October 2012 the board of directors of Spanish industrial conglomerate Inveravante (IV) were set to have a meeting to examine the situation regarding an investment IV had made in Venezuelan oil company Vetra, and to consider possible ways to divest said company. As managing director of Avantegenera, one of the business units of IV, Luis García was appointed to present realistic options for divesting Vetra to the board of directors of IV, offering a valuation of Vetra and recommendations for the future. He knew that the members of the board believed that it was time for a change and to finally make some profit from the investment in Vetra. Since the proposal to invest in Vetra had been made to the board by Mr. García some years earlier, he was very keen to bring the venture to a successful completion.
This case describes in detail the investment process, initiated in 2007, of a Spanish group (IV) in a small Venezuelan Oil & Gas company, and the eventual divestment of the company in 2012. The case focuses on the analysis of different alternatives, and their evaluation using qualitative and quantitative criteria.

Instructor's Manual Available from:
Francisco J. López Lubián,
fco.lubian@ie.edu

FINTECH: CHOOSING A CLOUD SERVICES PROVIDER

The CIO of Fintech – provider of a billing-and-payment processing service for alcohol distributors and retailers – wants to get experience using the cloud to host a new service for its clients. The planned service will make transaction data selectively available to alcohol distributors and retailers (with controls to ensure each client can access only their transaction data, to use for business analytics). The CIO (Joe Kwo) believes this will be a useful first step for his company to take before moving other services into the cloud. Staff brief him on three cloud service providers: Amazon, Google, and Microsoft. Each provider offers services which fit Fintech’s requirements, yet with important differences. Once Kwo makes this decision, he also needs to consider how to minimize risks (risks the provider brings, and other cloud computing risks) that could jeopardize Fintech’s relationship with its clients. Students are asked to select a provider based on information provided in the case. The instructor can also use the case to discuss vendor management and other strategic IT topics with students.

This case is designed primarily for an MBA Strategic IT Management course. It assumes students have introductory-level knowledge of relational database systems and cloud computing. If not, the case can be paired with suitable background readings on relational databases/ business analytics and/or cloud computing, or it can be assigned after these topics are covered in the course.

Instructor’s Manual Available from:
Clinton Daniel, cedanie2@usf.edu or
Janis Gogan, jgogan@bentley.edu

WELLS FARGO:
SETTING THE STAGECOACH THUNDERING AGAIN

Though management practice calls for an integrated, holistic perspective for effective decision-making, academic approaches are oftentimes compartmentalized in functional disciplines. The transgressions by Wells Fargo – the world’s largest bank by market capitalization in 2015 - resulting from the opening of over two million unauthorized customer accounts offers valuable lessons and provides a unique context to examine management challenges from the perspectives of strategic management, responsible leadership, compensation systems, business ethics, organizational culture and corporate governance. The case provides a context to discuss how an excessive focus on a quantifiable goal (cross-sell ratio for Wells Fargo) can create blind spots that can run counter to the strategic vision of businesses. It helps to demonstrate that a well-crafted strategy, and a well-articulated vision and values statement, mean very little if the implementation of the strategy is poor. The canvas of class discussion is limited only by the imagination and versatility of the instructor and the enthusiasm and preparedness of the class. An extensive instructor’s manual is available to provide an
instructor with rich materials to plan out the class session to address the pertinent challenge facing Tim Sloan, Wells Fargo’s new CEO: What changes are needed to the strategy, structure and systems at Wells Fargo to restore its reputation and regain the trust of its customers?

Instructor’s Manual Available from:
Mahendra R. Gujarathi,
mgujarathi@bentley.edu

DELTA PLASTICS OF THE SOUTH:
PRODUCT INNOVATION IN A RESISTANT MARKET

Delta Plastics of the South developed a new product, Pipe Planner, which was complementary to its core product, Polytube, used by farmers to irrigate crops in the delta region of Missouri, Arkansas, Mississippi and Louisiana. In this case the students can study the failure of diffusion of a market innovation (adoption rate of less than 3%) and analyze the factors that led to that failure in the delta region. While there is some quantitative analysis to understand the potential market, the Instructor’s Manual focuses heavily on the diffusion, and failure of diffusion, of innovation in a particular social context—farmers in the delta. This case is suitable for use in a class on communication, product innovation and marketing for upper level undergraduates or graduate students. Students use the analysis of failure of diffusion to propose and evaluate options for Delta Plastics regarding the development of an incremental innovation and its marketing and adoption within its core market.

Instructor’s Manual Available from:
David G. Hyatt
dhyatt@uark.edu
Join NACRA Today!

Membership Includes a Year’s Subscription to the
Case Research Journal

The quarterly Case Research Journal publishes the newest and best research-based teaching cases in the world (from authors outside the commercial case-publishing schools). The North American Case Research Association, publisher of the Case Research Journal, encourages the widest possible reproduction and use of the cases developed through its workshops and the Journal’s review process, always with appropriate notice of copyright. Cases that have been published in the Case Research Journal can be purchased through other distribution partners whose links may be found on the NACRA website, www.nacra.net.

Questions regarding special permissions, photocopying, distribution, etc., may be answered by Susan Sieloff, V.P. of Marketing: s.sieloff@northeastern.edu.

Cases in all administrative disciplines are double-blind reviewed; about one in five is accepted. Instructors’ Manuals (Teaching Notes), too, are rigorously reviewed and often include analytic insights suggested by reviewers. Most IMs will alert you to points that differentiate outstanding student performance. The IMs are not published because CRJ appears on library shelves, but they are available from the case authors, whose contact information is given in a “Pedagogical Prelections” section at the end of each issue. This section, obscurely titled to hide it from curious students, hints at what you may find in the Instructor’s Manual.

CRJ is professionally published as a membership journal by the non-profit North American Case Research Association (NACRA).

Please join NACRA by going to the website: https://www.nacra.net/members/index.php5

Memberships to NACRA are $50 US and include NACRA membership, a subscription to the Case Research Journal and the NACRA Newsletter. If you have questions about membership, please contact:

Lynn Southard, Assistant Editor
Case Research Association
7561-A Suffield Road
Stokesdale, NC 27357
llsoutha@uncg.edu
336-643-8048

Does Your Library Carry The Case Research Journal?

North American library subscriptions are $75. North American library subscriptions should be sent to:

Lynn Southard, Assistant Editor
Case Research Association
7561-A Suffield Road
Stokesdale, NC 27357
llsoutha@uncg.edu
336-643-8048
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.