

ABSTRACTS ONLY

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CASE RESEARCH JOURNAL

**OUTSTANDING TEACHING CASES
GROUNDED IN RESEARCH**

GINA GRANDY, EDITOR

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RESEARCH ASSOCIATION**

Editor

**Gina Grandy
University of Regina**

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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.
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.
9. **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:

Gina Grandy, Editor
crj.editor@uregina.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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If you want to use one of these distributors, but cannot find the CRJ case you want, contact the NACRA VP Case Marketing, Brent D. Beal, bbeal@uttyler.edu, 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

Welcome to Volume 39 Issue 1 of the *Case Research Journal*. In this issue you will find six cases. Of those six cases, five feature entrepreneurial or family owned businesses. Two cases are in the area of Family Business, one in Not for Profit Management, one in Marketing, and two in Strategic Management.

The issue starts with one of the two cases in the Family Business area, “Push the Cart? Grind the Granite?” by Danielle Clark and Janis Gogan. The case highlights the many challenges of operating a small business and related succession planning considerations. After confronting a health scare and a fire destroys one of his two businesses, Paul Tucceri, faced a difficult decision. The insurance payout would not cover the expenses to rebuild his restaurant affected by the fire and his doctors told him to slow down. Tucceri was contemplating whether or not he should walk away from the restaurant business and focus on his second business or follow his son’s advice and restore the restaurant and keep both businesses running. “Skip Breitbach Feed & Seed: Pretty Soon?” by Terry McGovern and Janis Gogan also highlights succession planning considerations in a family business. Skip Breitbach, owner of a 5th generation, 150 year old family business, was approached with an offer to buy his business. Breitbach wasn’t ready to retire but the offer had him seriously thinking about the future of his business – sell outright, sell and stay on as management, or pass the business onto his daughter.

This issue also features a Strategic Management case of a small family owned business, an antiquarian bookstore, co-owned by married couple Pat Chan and Nicky Caxton. “Books on the Books: Can a Change in Channel Strategy Promote Sales for an Antiquarian Bookseller?” is written by Colleen Sharen and Mark Feltham. Earlier in the year Chan and Caxton moved their entrepreneurial venture out of their home into a retail outlet. Unfortunately, seven months later they had not experienced the expected sales increase. They needed to decide if they should stay in their current location or move. Another case in this issue also focuses on an entrepreneurial venture, “Snakes & Lattes: Playing the Marketing Strategy Game” by Eric Dolansky. This Marketing case features entrepreneur Aaron Slade CEO of Snakes & Lattes, a chain of board game cafés in Toronto, Canada. Slade’s ambitious growth plans to sell franchises in 20 North American cities meant he had to decide the extent to which the marketing and communication should be decentralized or centralized. He was particularly concerned about the impact of this decision on brand identity.

The other Strategic Management case in this issue, “Veritas: The First ‘Real Food’ Supermarket” is written by Alfred Vernis and Lourdes Urriolagoitia. This case is international in scope, and co-founder and CEO, Silvio Elías, was considering his company’s expansion plans into Madrid, Spain. Veritas was a leading organic supermarket chain in Spain, and Elías was toying with the idea of expansion through independent stores or via a partner. It was an extremely competitive landscape and as such he needed to get it right.

This issue also includes a case on a topic we rarely see, one on a community bond financing strategy. “Innovation Works Community Bond” by Melissa Jean is a Not for Profit Management case exploring a decision faced by Lina Bowden. Bowden was chair of the Finance Committee of Innovation Works, a not for profit located in Ontario, Canada. The organization needed \$1 million in capital to fund renovations on a building intended as a co-working space and to support social innovation. Bowden was evaluating the viability of a community bond financing strategy.

As always, I would like to thank the tireless efforts of our reviewers and the editorial team. Please look over the table of contents of this issue and consider using one or more of these cases in your courses, or

perhaps even more significantly consider sharing the table of contents from this issue with your colleagues so they can see the interesting cases that will now be available for adoption through our numerous distribution partners, including Harvard, Ivey and The Case Centre.

Finally, we want to encourage all of you to submit your cases to the *Case Research Journal*. Publication in the CRJ provides you the broadest access to distribution and as such presents the greatest opportunity for your case to have real impact on the education of students around the globe. While our review process is quite rigorous, and we necessarily reject more cases than we can accept (our acceptance rate is about 20%), we work hard to turn around case reviews within about 60 days. That means within about 60 days of submission of your decision-focused case, you will have reviewer and editor feedback and a reasonable indication of the potential for your case to earn publication in the CRJ. We look forward to seeing your cases.

Sincerely

Gina Grandy, Editor
Case Research Journal

Abstracts Only

FAMILY BUSINESS

- *Family Business* **Push the Cart? Grind the Granite?** 1
 - *Small Business*
 - *Predictable Crises*
 - *Succession Planning*
- Danielle J. Clark,* Hillsborough Community College and Janis L. Gogan, Bentley University [4001 W Tampa Bay Blvd, Tampa FL 33614, danielleclark319@gmail.com]

The 62 year-old founder/owner of two small family businesses – a Massachusetts-based small fast-casual restaurant and a granite restoration business -- confronts many crises in his career. Through heroically long hours and hard work, he avoids financial ruin. Then in 2015 he survives a life-threatening heart attack, only to confront a new crisis just weeks later, when a devastating fire destroys the restaurant. He needs to decide whether to minimally restore the restaurant and walk away from it, or fully restore it and return it to full operation. If the latter, he will need to decide whether to continue as before or plan to sell it once it is again operating at a profit. His son and wife have different opinions. His son wants to continue as before, and eventually succeed his father as owner/manager of both businesses. His wife, shaken by his heart attack, wants him to slow down: either retire or sell one business. His daughter – the only family member with a business degree – expresses no opinion, other than to reiterate that she has no interest in working in either business. The owner weighs his options.

Intended Courses and Levels

This field-researched case was prepared for use in an undergraduate course on Family Business or Small Business Management. A Family Business Instructor will likely organize the course according to stages of business growth (founding issues, initial growth, maturity or decline). Many instructors will find it useful to position this case relatively late in the course -- preferably in a module consisting of at least three cases, each exploring different approaches to and contexts of family business succession.

Learning Objectives

This case supports the following learning objectives:

- Identify challenges associated with running a small family business, and the dynamic interplay between individual, contextual, and financial considerations.
- Recognize the need for and importance of family business management succession planning.
- Create a family business management succession plan through a collaborative process.
- Prepare for predictable surprises and crises.

FAMILY BUSINESS

- ***Family Business***

- *Small Business*

- *Succession Planning*

- *Leadership Development*

- *Management*

- *Development*

Skip Breitbach Feed & Seed: Pretty Soon?

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Terry M. McGovern,* University of Wisconsin-Parkside and Janis L. Gogan, Bentley University [900 Wood Road, P.O. Box 2000 Kenosha, WI 53141-2000; mcgovern@uwp.edu]

In 2018, the 64-year-old owner of a small 5th-generation family business in rural Iowa has not begun succession or retirement planning. His older daughter asks about possibly taking over the store someday; Skip defers this talk until after the busy harvest season. Next, “Big Ag Feeds” (disguised) offers to buy his business; they want an answer by year-end. Skip discusses the offer with his wife. If he accepts it, ownership would transfer to Big Ag in four years, ending the family business legacy. Skip always assumed he would keep the business in the family, yet now he considers this option and three others: 1) Counter-propose to transfer ownership to Big Ag in one year (“clean break” to retirement). 2) Groom his daughter to succeed him as owner/manager; 3) Hire an outside manager to run the store (retain ownership). Seeing that times are changing (huge agribusinesses are replacing small farms, with repercussions for his business; emerging technologies and new government regulations bring other opportunities and threats) Skip believes the next owner/manager will face a tougher road than the rough road he traveled in his career journey.

Intended Courses and Levels

This case gives students an opportunity to consider individual, relational, financial and contextual facets of family business planning in general (and succession and retirement planning in particular), in a changing industry. In an undergraduate or MBA family business course the case can serve as an introduction to the family business system (intertwined family, business, and ownership issues) and how and why planning is important and challenging in this context. In a small business course, the case can be set in a module on unique family business challenges (some small business courses position this module late in the course, after students have mastered basics of strategic positioning, venture financing, and systems and structures).

Learning Objectives

- Define and explain the importance of planning in a family business, taking into account intertwined family, business, and ownership issues.
- Identify factors that contribute to family business planning complexity.
- Evaluate specific ownership and management options for a family business.
- Create a management development plan for a family business successor.

MARKETING

- *Marketing Strategy* **Snakes & Lattes: Playing the Marketing Strategy Game** 31
 - *Positioning*
 - *Target Market*
 - *Managing Growth*
- Eric Dolansky,* Brock University [1812 Sir Isaac Brock Way, St. Catharines, Ontario, L2S 3A1, edolansky@brocku.ca]

Aaron Slade, CEO of Snakes & Lattes, was tasked with overseeing the ambitious growth plan for the company. Snakes & Lattes was a chain of board game cafés in Toronto; customers could come and play board games, eat, drink, and have a good time. The firm had grown from one small location opened in 2010 to three locations in 2018, each larger than the last, and annual revenue had increased to \$7 million. The company had announced plans to sell franchises in about 20 North American cities and open three more company-owned cafés. The immediate problem that Slade was wrestling with had to do with marketing strategy and communication. With each venue having its own character there was room for more decentralized marketing, but only if it was not to the detriment of the brand. Slade needed a strong marketing plan to complement the growth in locations.

Intended Courses and Levels

This case was designed to be used either at the beginning or end of a general marketing case course, at the graduate or senior undergraduate level. If used early in the course it can introduce a framework and structure for making marketing decisions, as well as introducing a wide range of marketing topics (4 Ps, segmentation, targeting, positioning, consumer analysis, competitive analysis) in a digestible way. If used late in the course it can be a capstone case, to bring together the various topics already covered in the course, and test/reinforce the concept of fit between strategy and tactics. For this reason (and the possibility of quantitative analysis) it can also work as an exam case.

Learning Objectives

The key learning objectives of the case are as follows:

- Discover the link between strategy and tactics in marketing, and stress the importance of fit between them;
- Explore the value of a centralized versus decentralized communications plan;
- Understand the challenges of managing a rapidly-growing business, in terms of marketing consistency and brand identity;
- Learn how meaningful figures can be derived from relatively simple and sparse data.

NOT FOR PROFIT MANAGEMENT

- *Not for Profit Management* **Innovation Works Community Bond** 49
- *Social Entrepreneurship* Melissa Jean,* Brescia University College [1285 Western Road,
- *Social Innovation* London, ON, Canada, N6G 1H2, mjean@uwo.ca]
- *Social Finance*

Lina Bowden, chair of the Innovation Works Finance Committee, needed to finalize a plan to raise an additional \$1,000,000 of capital. The capital would primarily be used to fund renovations to a building that had become known as Innovation Works, a novel coworking space and social innovation hub located in London, Ontario, Canada. The building was already secured; however, significant renovations were required before all floors could be rented. Members of the Innovation Works Project Team expressed a strong desire to launch London's first ever community bond to finance the renovations. They tasked the Finance Committee with the job of providing a recommendation on the viability of the community bond financing strategy. If the Finance Committee concluded that community bond financing was not viable, Bowden would need to present a convincing case for pursuing another strategy given the team's strong desire to make a statement in the community.

Intended Courses and Levels

The case is intended for an introductory level social entrepreneurship or nonprofit management course at either the undergraduate or graduate level. In particular, the case would be appropriate for a module or course component on social innovation or social finance. The case would also be appropriate for a cash flow analysis module in a traditional financial management or finance course.

Before completing the case, students should be familiar with the concepts of social finance, projecting cash flow statements, and sensitivity analysis.

Learning Objectives

Upon successful completion of the case, students should be able to perform the following:

- Describe the concepts of coworking, collective impact, and impact investing,
- Understand the benefits and risks of community bond financing,
- Develop criteria to assess the viability of a community bond offering,
- Assess the viability of a community bond offering, and
- Recommend a plan of action based on quantitative and qualitative information.

STRATEGIC MANAGEMENT

- *Strategic Management*
- *Management Preference*
- *Small Business*
- *Family-Owned Business*

Books on the Books: Can a Change in Channel Strategy Promote Sales for an Antiquarian Bookseller?

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Colleen M. Sharen,* Brescia University and Mark Feltham [1285 Western Road, London, ON N6G 1H2, csharen@uwo.ca]

Pat Chan and Nicky Caxton, a married couple and co-owners of Chan & Caxton Booksellers, faced a difficult decision. Seven months before, they had changed their channel strategy, moving from their home-based business to a shared retail space to increase revenue and decrease lower-margin consignment sales. This new strategy was not generating the expected increase in sales; however, the space offered them both low cost and flexibility to deliver special events for their customers.

Were these problems merely growing pains, or were they evidence that the bricks-and-mortar retail channel wasn't working out? Pat and Nicky thus found themselves pondering several options: staying in their current location, moving their business back to their apartment, renting an office space, or finding a stand-alone retail space in a better location. Each option had different potential implications for their business model, channel strategy, and their family life.

Intended Courses & Levels

This case is appropriate for upper-year undergraduate and graduate business courses or workshops in small business, small-business development, entrepreneurship, or family business. It explores the ongoing issues of managing and adjusting when a strategy fails in a context of small business and constrained resources.

Learning Objectives

After successfully completing this case, students should be able to:

- Assess the competitive landscape, consumer behaviour, and business model of a small family business in the context of their channel decision.
- Assess the management and personal preferences that inform the protagonists' decision-making process.
- Identify possible decision-making bias due to these preferences.
- Recommend an appropriate channel decision.

- *Strategic Management*
- *Five Forces*
- *Value Chain*
- *Core Competences*

Veritas: The First “Real Food” Supermarket

85

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In January 2016, Silvio Elías, co-founder and CEO of Veritas, Catalonia’s leading organic supermarket chain, headed to a meeting with the company’s board to present the alternative options to enter in Madrid. At that time, Madrid was thriving like no other Spanish region and stood out as an attractive market for expansion. Most of all, operating in the nation’s capital accounted for an instrumental step forward on the path to accomplish Elías’ overriding vision: turning Veritas into Spain’s organic food leader.

Nonetheless, Spain’s organic food retailing landscape was changing very rapidly, with increased, fierce competition from a diverse range of players. Against this competitive backdrop, Elías wondered if Veritas should approach Madrid by opening their own stores, following the same strategy it had used to rise as industry leader in Catalonia. Eroski, a conventional supermarket chain, had also reached out to Elías to offer Veritas an opportunity to display some of its private label products at Eroski’s stores in Madrid as they did in Catalonia. Elías needed to make the final decision on his recommendation to the board.

Intended Courses & Levels

This case has been prepared for advanced Bachelor in Business Administration courses on corporate and business strategy. As it focuses on competitive strategy, this case may fit in nicely in the middle of a strategy course, when dealing with strategy formulation. This manual for instructors has been elaborated for an 80-minute class session.

Learning Objectives

While students will largely discuss how to create a sustainable competitive strategy, this case also provides insights on growth, distinctive competitive positioning, and geographic expansion.

Analyzing the Veritas case will enable students to:

- Apply Porter’s five competitive forces to examine a competitive environment and find ways for a company to cope with these forces in its segment.
- Learn how to work ‘downstream’ or ‘upstream’ within the value chain and how to connect it to the formulation of a sustainable competitive strategy.
- Assess a company’s differentiating and success factors.
- Understand the importance of ‘leading from the front’ in a changing industry with increasing competition, and recommend how to hold this position.



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