

ABSTRACTS ONLY

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CASE RESEARCH JOURNAL

**OUTSTANDING TEACHING CASES
GROUNDED IN RESEARCH**

GINA GRANDY, EDITOR

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**NORTH AMERICAN CASE
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
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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.

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- **Harvard Business School Press** (<http://hbsp.harvard.edu/>)
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- **Pearson Collections** (<https://www.pearsonhighered.com/collections/educator-features.html>)
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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 40 Issue 1 of the *Case Research Journal*. This is the first issue of the year and in this issue we celebrate the nominees and winner of the **Curtis E. Tate Jr.** award which recognizes the best case published in *Case Research Journal*. The **Curtis E. Tate Jr. Award** is given each year at NACRA's annual meeting to the case that is deemed to be the best case published in the *Case Research Journal* in the preceding year. The process for determining the award recipient begins with the editors of the CRJ nominating up to eight cases for the award. A panel of the three most recent past presidents of NACRA then select two to four cases as finalists and from this set of finalists they select the Tate Award winning case.

I would like to congratulate the authors of all three cases nominated for the award and extend a special congratulatory note to the winner of the award for the best case published in 2018 (volume 38). The recipients of the award were Sergio Canavati, Armand Gilinsky and Jeffrey Young for their case "Russian River Brewing Company in 2016: Positioning Pliny the Younger Craft Beer for Growth." The two other cases nominated for the award include "KidZania: Spreading Fun Around the World" by Andres Terech, Martha Rivera Pesquera and Maria Guadalupe Torres and "Pleasant Ridge Habitat for Humanity Second Chance Home Supply" by John J. Lawrence and Michael McCollough.

In this issue of *Case Research Journal* you will find five cases. The primary subject areas for each of those five cases include: Entrepreneurship, Finance, Information Technology Management, Leadership Development and Marketing. Four of the five cases feature entrepreneurial firms and two of the five cases features women protagonists. Two cases feature particularly timely topics – the sharing economy and blockchain.

The two cases which feature women protagonists highlight gender considerations in their Instructor's Manual. *Case Research Journal* is committed to encouraging authors to submit cases which depict decision makers who represent a designated equity seeking group. These two cases advance our commitment in this area. "Reviving the One Woman Campaign – Addressing a Clogged Leadership Pipeline" by Grishma Shah, Srinivas R. Pingali and Angela Grotto covers an important, persistent, and often unaddressed issue in organizations - how to address the shortage of women in senior leadership roles. Peri Malhotra, Head of Employee Development at Quattro Global Services (a business process management consultant firm in India) had to develop a comprehensive assessment of the 'One Woman Campaign' initiated two years prior. The program was intended to attract, retain, develop and promote women into senior leadership roles across the organization. The program experienced some success but as the budgeting process began for the 2018, there was some risk that the program would not continue to be supported. Malhotra and her direct report had to find a way to demonstrate the impact of the program, while considering ways to enhance its impact to ensure continued support.

The second case featuring a women protagonist and incorporating considerations of gender, "Green Zebra: Grow Fast or Grow Slow" by Janet Hamilton and Charla Mathwick, is a finance case with a special focus on entrepreneurial finance. This is the second case published in *Case Research Journal* on the firm Green Zebra Grocery (the other was published in volume 39, issue 3). In the fall of 2019 CEO Lisa Sedler was reconsidering expansion plans for her healthy convenience store start-up company. Facing restricted options for venture capital support she needed to decide if she should continue with her more aggressive growth plans to expand into Seattle with three new stores, or shift to slower growth with expansion of one additional store in Portland, where Green Zebra already had an established presence. In addition to the opportunity for students to apply capital budgeting, financial statement and alternative

financing option analyses, the case draws attention to the unique funding challenges faced by women entrepreneurs attempting to scale their businesses.

The case by Howard E. Goodle and Janis L. Gogan, “Good Shepherd Pharmacy and Remedi: Will this Blockchain Deliver Donated Drugs to Needy Patients” covers the novel and timely topic of a blockchain system. Pharmacist and social entrepreneur Phil Baker was designing a blockchain application and facing financial pressures. He needed to identify, prioritize and mitigate project challenges before finalizing the design.

The final two cases in this issue also depict decisions made by owners of entrepreneurial firms, “Allovisions.com: Good Neighbours Need Good Partners” by Catherine Lejealle and Eric Dolansky and “Keweenaw Mountain Lodge: An Opportunity Worth Pursuing?” by Lisa Eshbach and Nancy M. Levenburg. The former is a marketing case on a sharing economy based business, and the later an entrepreneurship / small business management case about co-preneurs deciding whether or not to take on a new business which would align with their retirement plans.

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.

I would also like to remind our readers of two forthcoming special issues. *CRJ* is hosting a special issue on **Healthcare Management** with submissions due in February 2020. Later in 2020 we are hosting a special issue on **Multi-disciplinary** cases with submissions due in October 2020. Check out the *CRJ* website for the call for cases for the special issues.

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

**Congratulations to the Curtis E. Tate Jr. Award Winners
(Best Cases Published in 2018 Volume 38 of the Case Research
Journal)**

Curtis E. Tate Award Winner for Volume 38

**Russian River Brewing Company in 2016: Positioning Pliny the Younger Craft
Beer for Growth**

by

Sergio Canavati, Armand Gilinsky and Jeffrey Young
Sonoma State University

Curtis E. Tate Award Runners-Up

KidZania: Spreading Fun Around the World

by

Andres Terech, University of California – Los Angeles
Martha Rivera Pesquera, IPADE Business School
Maria Guadalupe Torres, IPADE Business School

Pleasant Ridge Habitat for Humanity Second Chance Home Supply

by

John J. Lawrence and Michael McCollough
University of Idaho

Abstracts Only

ENTREPRENEURSHIP

- *Entrepreneurship* **Keweenaw Mountain Lodge: An Opportunity Worth Pursuing?** 1
 - *Small Business Management*
 - *Business Analysis*
 - *Business Valuation*
- Lisa Eshbach,* Ferris State University, and Nancy M. Levenburg, Grand Valley State University, [Office 340, 119 South State St., Big Rapids, Michigan 49307-2284, eshbacl@ferris.edu]

The long-time owners of a bridal and formal wear shop in a small community in Michigan's Upper Peninsula (U.P.) were contemplating making an offer to buy the Keweenaw Mountain Lodge (KML) property, located in Copper Harbor on the Keweenaw Peninsula. The property was owned and operated by Keweenaw County since its beginnings in 1933, and was situated on 167 heavily-wooded acres. The facility included a 6,000 square foot lodge built from logs and rough-cut stone, a banquet room and conference center, 24 rustic cabins, a small motel, and recreational activities. In 1970, the lodge was listed on the National Register of Historic Places, and in 1976, it was designated as a Michigan State Historic Site.

The Keweenaw Mountain Lodge had not produced profits in several years, and a consultant noted that some repairs were needed. The asking price for the property was \$1.5 million. The Olesons, who were in their 70's in age, were considering selling their bridal shop and using the proceeds towards purchasing the KML.

Intended Courses and Levels

The case is designed to be used in a course in which students focus on small business management and business acquisition by means of purchase. As such, the case would be useful in a graduate-level or upper-level undergraduate Entrepreneurship course or Small Business Management course. It could also be used in a Hospitality and Tourism Management course, although the Instructor's Manual is not focused on that audience.

Learning Objectives

- Apply the concepts of entrepreneurial orientation to evaluate the potential for a successful new business venture.
- Analyze a seasonal business, assessing its strengths, weaknesses and future potential.
- Evaluate how a firm's history, established market, features, location, and legal requirements may influence the analysis, and thus the worth of the business.
- Determine the value of the business and make a recommendation on how the prospective buyers should proceed.

- *Finance*
- *Financing Growth*
- *Capital Budgeting*
- *Venture Financing*
- *Women Entrepreneurs*

Green Zebra: Grow Fast or Grow Slow? Case B

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Janet Hamilton,* Portland State University and Charla Mathwick, Portland State University [P.O. Box 751, Portland, Oregon 97207-0751, hamiltonj@pdx.edu]

The CEO of Green Zebra weighed the implications of growth for her chain of innovative, organic neighborhood grocery stores. The stores were at the forefront of both healthy food and convenience trends but faced fierce competition from larger players entering the market. A rapidly diminishing cash position forced the CEO to compare how two investing-financing alternatives contribute to growth and to reducing the cash burn of current operations. A slow growth option required less financing and might allow the company to more rapidly achieve positive cash flow. The CEO was concerned that it might also result in permanently reduced market share. The alternative, rapid expansion into a new market, had the potential to rapidly scale operations and enhance competitive position. Yet rapid growth might not be feasible with available financing alternatives. The CEO, and students, must develop financial forecasts, prepare a net present value, and evaluate financing alternatives to make a decision as to which growth strategy to pursue.

Intended Courses and Levels

This case is targeted for upper level undergraduate and graduate classes in financial management, financial strategy, and entrepreneurial finance.

Learning Objectives

- Integrate economic, industry, and firm trends into an assessment of financial health, both historic and forecast, using appropriate analytical tools.
- Apply financial forecasting tools to estimate the external funding requirements associated with alternative growth strategies.
- Apply analytical tools including weighted average cost of capital, NPV, and risk analysis to evaluate the feasibility of an investment.
- Develop criteria and evaluate the financial and other tradeoffs involved with alternative growth strategies that cannot be separated from the financing decision when funding is limited.
- Introduce students to information and resources on entrepreneurial funding options (i.e. bootstrapping, equity crowdsourcing).
- Introduce students to an entrepreneurial female-owned venture with specific emphasis on funding challenges unique to female-founders.
- Provide insight into some of the issues associated with estimating value and cost of capital for a privately held entrepreneurial business.

IT MANAGEMENT

- *IT Management* **Good Shepherd Pharmacy and RemediChain: Will this** 55
- *Blockchain* **Blockchain Deliver Donated Drugs to Needy Patients?**
- *IT Innovation*
- *IT Project Risks* Janis L. Gogan,* Bentley University and Howard E. Good, Bentley University
- *Social Entrepreneurship* [175 Forest Street, Waltham MA 02452-4705 USA. jgogan@bentley.edu]

In May 2019 a Tennessee pharmacist / social entrepreneur's startup, RemediChain LLC, was designing a blockchain application; Phil Baker hoped the coding of it would start soon. He previously formed a charity pharmacy (Good Shepherd) and successfully lobbied for a Tennessee law that allowed individuals nationwide to donate unexpired drugs to authorized Tennessee pharmacies, and redistribute them to needy patients. The RemediChain team was designing the blockchain software and other applications to enable efficient and secure collection of usable drugs from individual donors and redistribution to authorized patients. In the short term, the planned system would support Good Shepherd Pharmacy's medication redistribution, and later, Baker hoped the team would build out a scalable solution with broad reach. He wanted to identify, prioritize and mitigate foreseeable project challenges before the design was finalized and software development begins. His two organizations were under financial pressure, and he wanted to move forward quickly.

Intended Courses and Levels

This IM describes how to use this case in a project risks and governance module in an MBA-level Strategic IT Management course (designed to help students who aspire to non-IT leadership roles learn how non-technical managers and IT professionals work effectively together). The case gives students an opportunity to anticipate both business risks and project risks before an IT innovation project launches in a challenging context, and to plan ways to mitigate those risks.

Learning Objectives

- Evaluate whether an IT innovation (such as a blockchain system for secure medication redistribution) is a disruptive innovation.
- Anticipate business problems that can arise when a flawed IT application is implemented.
- Before a software development project begins, identify and consider the implications of foreseeable high-level IT project risks (project size, requirements clarity, technical expertise, organizational readiness, time pressure, and system interdependence risks).
- Offer appropriate and actionable managerial recommendations for planning and managing an IT project, given business and project risks, as well as the broader political, economic, social and technical context in which the IT project is situated.
- (OPTIONAL). Design a series of small-scale pilot tests to evaluate technical, operational, and/or economic feasibility of an IT innovation.

LEADERSHIP DEVELOPMENT

- *Leadership Development*
- *Human Resource Development*
- *Women and Advancement*
- *Gender Equity*
- *Diversity and Inclusion*

Reviving the One Woman Campaign – Addressing a Clogged Leadership Pipeline 75

Grishma Shah,* Manhattan College, Srinivas R. Pingali, Indian Institute of Management and Angela Grotto, Manhattan College [Manhattan College Parkway, Riverdale, NY 10471, grishma.shah@manhattan.edu]

In late 2017, Peri Malhotra, Head of Employee Development at Quattro Global Services (QGS) was concerned about the future of the One Woman campaign started at the firm two years prior. She led the initiative with her direct manager, Alok Narain, Executive Vice President of Human Resource and Development. Despite a concerted effort, Malhotra remained one of the few senior women executives at the firm. The One Woman campaign was launched in 2015 with the aim of attracting, retaining, developing and most importantly, helping women ascend the leadership ladder. The program was well received by participants, generating substantial buzz among women employees, but Malhotra had also heard some grumblings from male employees, especially about the preferential treatment the program maybe promoting. The financial budgeting process for 2018 had begun and unless Malhotra and Narain were able to provide a comprehensive assessment of the campaign, the value added by the initiatives and ways to improve it, the program would most likely be cut. Malhotra and Narain were reflecting on their efforts and both were eager to sustain the program.

Intended Courses and Levels

This case is appropriate for undergraduate human resource management courses and graduate level courses covering women in leadership, gender, inclusion and diversity, specifically in a global context. At both levels, we find the case will be valuable in generating discussion on how to assess strategic human resource initiatives designed to increase gender diversity in senior leadership with respect to the recruitment, development, and retention of women employees.

Learning Objectives

- Critically evaluate the effectiveness of human resource programs that are designed to promote gender parity in leadership.
- Assess the effects of various organizational practices and behaviors that may inhibit women's leadership development and advancement.
- Devise ways for organizations to achieve the goal of gender parity in leadership.

MARKETING

- **Marketing**
 - *Marketing Channels*
 - *Marketing Channels Development*
 - *B2B Marketing*
 - *Growth Strategy*
 - *Online Alliances*
- AlloVoisins.com: Good Neighbours Need Good Partners** 91
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- The sharing economy web platform AlloVoisins allowed people within communities to post needs (e.g. babysitting, borrowing tools, house checking, etc.) for other members to fulfill for a mutually agreed upon fee. Even though 2018 enrolment goals were met seven months ahead of schedule, Edouard Dumortier, CEO, was worried. A large new competitor was entering the market. To help grow Allovoisins quickly Dumortier planned a Business-to-Business-to-Consumer (B2B2C) strategy to drive enrolment and created a list of potential partners. In order to maximize AlloVoisins' opportunities, partners would need to provide access to the largest database of customers possible but also fit well with the value offered by AlloVoisins. Assessing a match between Allo Voisins and potential partners needed to be done. The question, though, involved selecting partners from a list he came up with after some research to best achieve his goals.

Intended Courses & Levels

The case is suited for use in an introductory marketing course, specifically those parts of the course having to do with segmentation, growth, channels, partnership, collaboration, or digital marketing. The same decision (finding a suitable B2B2C partner) fits with any of these topics, but different aspects may be stressed.

The case puts the student in the role of the decision maker and provides the opportunity to assess B2B2C as a growth solution and to make decisions about who to partner with to best benefit AlloVoisins. The case also allows for discussions around brand awareness, consumer behaviour, growth, B2B relationships, sharing economy and distribution in general.

Learning Objectives

- Understand the nature of growth strategies in the sharing economy;
- Examine the value of B2B2C strategies;
- Evaluate, from multiple perspectives, the suitability of collaborative arrangements; and
- Identify criteria to assess the value of partnerships within the use of B2B2C strategies, and use these to develop a specific recommendation regarding partners.



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