

*Western Casewriters Association*

**PROCEEDINGS  
of the  
WESTERN CASEWRITERS ASSOCIATION  
2013 CONFERENCE**

**El Dorado Hotel & Spa  
Santa Fe, New Mexico  
March 14, 2013**



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WESTERN CASEWRITERS ASSOCIATION  
2013 CONFERENCE**

Edited by Keith H. Sakuda  
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[www.westerncasewriters.org](http://www.westerncasewriters.org)

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**PROCEEDINGS OF THE WESTERN CASEWRITERS ASSOCIATION**  
**2013 CONFERENCE**

	<b><u>Page</u></b>
Western Casewriters Association	1
History of the Western Casewriters Association	2
Welcome to the Conference	3
WCA Reviewers	4
WCA Awards	5
PROGRAM Western Casewriters Association Conference	6
Table Assignments	7
How to Get the Most out of the Roundtable Case Discussion Sessions	8
Publishing Your Case Research	10
Call for Cases	11
Case Synopses	
Abercrombie & Fitch: Standing in a Crowded Market Space	16
Airworks: Indian Aviation Services Taking Off	17
Blendtec: On-Shoring Blender Manufacturing	18
Café Britt: A Costa Rica Pride	19
Cirque du Soleil: An Innovative Culture of Entertainment	20
EZRA Innovations, LLC	21
Granulab (D): Positioning Granumas in the Bone Graft Substitute Industry	22
Ground War Between UPS and FedEx	23
Institutionalism and Culture in Strategies of Multinational Firms: The Case of Johnson Controls INC.	24

I've Got a "Tablet" – But I'm Having a Hard Time Swallowing It!	25
J.H. Dunning Corporation	26
Keva Fitness Workout	27
Light Cost – Heavy Impact: A Case Study of China Light & Power Project in India	28
People of Wal-Mart: Targeting the World's Largest Retailer and its Customers	29
Promoting Entrepreneurship in Egypt: The Case of the Alexandria Business Association	30
RDS Company: Ethical Dilemmas of Consulting	31
Research in Motion: Insight with Hindsight	32
Retain: Managing Growth and Market Share	33
The Shape of Things to Come: A Small Town Gym's Challenge	34
Telecommunication Problems in Mexico	35



# WESTERN CASEWRITERS ASSOCIATION

The Western Casewriters Association (WCA) Conference is held yearly in conjunction with the Western Academy of Management (WAM). Participants can attend both conferences. The WCA Conference is a unique opportunity to engage with other casewriters in a small group format to exchange feedback and polish a case, learn about using cases in the classroom, get a peer-reviewed conference and proceedings on a vita, and enjoy presentations from leading case researchers and case educators.

The WCA Conference is an excellent professional opportunity because it is a "developmental" meeting designed to provide feedback from experienced case researchers. Submissions are double-blind peer reviewed by at least two reviewers. Participants at the conference will have their cases reviewed by other authors. The objective is to help participants move their projects towards journal publication.

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# HISTORY OF THE WESTERN CASEWRITERS ASSOCIATION

The Western Casewriters Association was started by Dick Eisenbeis in 1989 at the Western Academy of Management. It has convened an annual case-writing conference in the round-table format since then to help train, develop and support case researchers.

The past presidents of the organization include:

Sally Baack  
Jyoti Bachani  
Issam Ghazzawi  
Duane Helleloid  
Anne Lawrence  
Steve McGuire  
Joshua Mindel  
Bruce Robertson  
V. Seshan  
Jeff Shay  
James Spee  
Teri Tompkins  
George Whaley  
Joan Winn



# WELCOME TO THE CONFERENCE

Welcome to Santa Fe and the 2013 Western Casewriters Association Conference. The WCA was founded with the mission to help train, develop, and support case writers. This year we seek to continue this mission with our roundtable format designed to provide specific feedback on your case and instructor's manual. Our hope is that many chose to pursue the goal of publishing your work in peer reviewed journals.

The WCA believes in fostering a supportive environment and promoting mentoring between case writers. We encourage our more experienced members to share their insights and ideas with new case writers to continue the development of our field. Issam Ghazzawi will open our morning session with an introduction to roundtable sessions and proper roundtable etiquette. Teri Tompkins will then present our keynote address on Instructor's Manuals.

After the keynote we will break into our roundtable discussion groups to discuss our cases and instructor's manuals. All case writers should use the roundtable sessions to solicit constructive feedback for improving their cases.

After lunch, we will hold the WCA Business Meeting. All participants are strongly encouraged to attend. In the afternoon, we will conclude the roundtable discussions and turn the program over to several guest speakers. Steve McGuire will share his thoughts and experiences on mentoring student case writing, and Jeff Shay and Craig Lundberg will follow with a thought-provoking discussion on the development and challenges. We will conclude the conference with reflections on the day as well as with a presentation of rewards.

We hope you find the conference rewarding.

**Keith H. Sakuda**  
**2013 Program Chair & President-Elect, *Western Casewriters Association***  
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# **WCA REVIEWERS**

## ***Western Casewriters Association 2013 Conference*** **Santa Fe, New Mexico**

All submissions to the Western Casewriters Association Conference were double-blind peer reviewed. WCA thanks the following reviewers for their contributions:

**Andrew Fergus**, Ph.D., Thompson Rivers University

**Issam Ghazzawi**, Ph.D., University of La Verne

**Leslie Goldgehn**, Ph.D., University of San Francisco

**Kay Guess**, Ph.D., Samford University

**Duane Helleloid**, Ph.D., University of North Dakota

**Chalmer Labig**, Ph.D., Oklahoma State University

**Teresa Martinelli-Lee**, D.P.A., University of La Verne

**Marie Palladini**, J.D., California State University, Dominguez Hills

**Sat Parashar**, Ph.D., University of California San Diego & University of Redlands

**Karen Robson**, Simon Frasier University

**Keith H. Sakuda**, Ph.D., University of Hawaii – West Oahu

**Stuti Saxena**, Ph.D., National Innovation Foundation - India

**Paula Weber**, Ph.D., St. Cloud State University

**Judith White**, Ph.D., St. Mary's University

# WESTERN CASEWRITERS ASSOCIATION AWARDS

Two awards will be given at the Conference. Reviewers nominated cases to the Awards Committee for selection of the best papers. The two Awards are for **“BEST CASE”** in the Proceedings, for which all submissions are considered, and **“BEST MENTORED CASE”** for the best case by a student author(s) and faculty mentor.

The WCA Awards Committee in 2013 consisted of two committees comprised of experienced case writers **Steve McGuire, Ph.D., Teresa Martinelli-Lee, D.P.A., V. Seshan, Ph.D,** and **Duane Helleloid, Ph.D.** The Western Casewriters Association thanks the Awards Committee members for their contribution, as well as all reviewers who helped narrow the choice of cases for the committee.

Award winners will be recognized at the close of the Conference.

# PROGRAM Schedule

## *Western Casewriters Association 2013 Conference*

7:30 to 8:00 am <b>SUNSET ROOM</b>	WCA Breakfast
8:00 to 9:30 am <b>ZIA B &amp; C</b>	Welcome to WCA (Keith Sakuda) Introduction to Roundtable Etiquette (Issam Ghazzawi) <i>Keynote Speaker:</i> (Teri Tompkins)
9:30 to 10:00 am <b>ZIA B &amp; C</b>	<b>Roundtable Discussions of Cases (1)</b>
10:00 to 10:15 am <b>Eldorado Court and Lobby Lounge</b>	Refreshment Break with WAM
10:30 to 11:30 am <b>ZIA B &amp; C</b>	<b>Roundtable Discussions of Cases (2 &amp; 3)</b>
11:45 am to 12:45 pm <b>ZIA A</b>	WCA / WAM Lunch
1:00 to 1:30 pm <b>ZIA B &amp; C</b>	<b>Western Casewriters Association Business Meeting</b> <b>Treasurers Report, Update on NACRA, Update on JCRI</b> (All WCA Participants to attend)
1:30 to 2:15 pm <b>ZIA B &amp; C</b>	<b>Roundtable Discussions of Cases (4)</b>
2:15 to 2:30 pm <b>Eldorado Court and Lobby Lounge</b>	Refreshment Break with WAM
2:30 to 3:45 pm <b>ZIA B &amp; C</b>	<b>Mentoring Student Case Writing</b> (Steve McGuire)
3:45 to 4:00 pm	Short Break
4:00 to 4:45 pm <b>ZIA B &amp; C</b>	<b>Presentation: Toward More Tough-Minded Case Writing and Case Teaching</b> (Jeff Shay and Craig Lundberg)
4:45 to 5:00 pm	<b>WCA Conference Reflections</b> (Open Discussion) Awards for <b>“BEST CASE”</b> and <b>“BEST MENTORED CASE”</b>
5:00 pm onward	Join the WAM Social Activities

# TABLE ASSIGNMENTS

## *Western Casewriters Association 2013 Conference*

### **Table 1: Table Leader: Issam Ghazzawi**

- Café Britt – Issam Ghazzawi
- J.H. Dunning – John Pappalardo
- Promoting Entrepreneurship in Egypt – Chalmers Labig
- V. Seshan
- Doug Gilbert

### **Table 2: Table Leader: Joan Winn**

- EZRA - Joan Winn
- ReTain – Michael McCollough
- Johnson Controls – Jose Vargas
- FedEx VS UPS – Kathy Caparoso
- Julia Ivy
- Paula Weber

### **Table 3: Table Leader: Teri Tompkins**

- Telecommunications in Mexico – Teri Tompkins
- People of Wal-Mart – Karen Robson
- Blendtec – Eugene Seeley
- RDS Company – Judith White & David Bowen

### **Table 4: Table Leader: Jyoti Bachani**

- Airworks – Jyoti Bachani
- Small Town Gym – Deborah Walker
- Research in Motion – Andrew Fergus & Tony Bell
- Keva Fitness – Lauren Solie
- Steve McGuire

### **Table 5: Table Leader: Teresa Martinelli-Lee**

- Cirque du Soleil – Teresa Martinelli-Lee & Marie Palladini
- I've Got a Tablet – Simon Wall
- Abercrombie & Fitch – Lori Peterson
- Granulab – Norjaya Yasin

# HOW TO GET THE MOST OUT OF THE ROUNDTABLE CASE DISCUSSION SESSIONS

This conference is a developmental workshop. Each person contributes to each case discussion and in turn receives feedback from each other person at the roundtable. Participants' preparation prior to the Conference and active participation at the Conference are crucial to the usefulness of the roundtable discussions and the value added that the Conference can deliver. Conference participants typically report that they were delighted with the helpful, constructive feedback they received.

## PURPOSE OF WCA CASE ROUNDTABLE DISCUSSIONS

Our purpose is to assist all case researchers to improve their cases for use in classes, for adoption by others, and for publication. Rarely is a case presented that is ready for journal publishing; yet even such a case can be improved. Case authors may feel overwhelmed by all the suggestions. The process is not negative; rather, we work with you for improvement, just as we expect that you will help others to improve their cases. Therefore, all participants must thoroughly prepare all cases and instructor's manuals (IMs). The discussion process is rigorous yet done in a supportive manner. You should expect that the first case discussed, long or short, will take more time than those that follow. Some issues will occur in several cases; discussion need not be repeated in detail after the first time the issues arise.

## HOW TO PREPARE YOUR CASE CRITIQUES

We focus on major as well as subtle ways to improve cases, not on proofreading details of grammar, spelling, etc. To give helpful feedback, you may (1) mark up the cases and IM, and give them to the author after discussion; or (2) prepare a summary of your comments and helpful suggestions prior to the Conference, and hand your written comments to the author. Important questions include:

- Is the case interesting? To students? To faculty? To potential journals?
- Does it address an important issue in the specified course(s)?
- Can teaching objectives be achieved with the case? Does the IM address these?
- Can the IM analysis be derived from the case (and other course material)?
- Are there enough data? Should more be added? Should some be deleted?
- Is the analysis tied to theory?
- Is the case presentation unbiased, or is the author's opinion evident?

## DUTIES OF PARTICIPANTS IN THE CASE ROUNDTABLES

**Table Leaders:** Brief the participants about what will happen. Determine the case sequence. Be sure there is a recorder for each case. Guide the discussion. Keep the focus on important issues, not on proofreading. Discourage repetitious comments. Be sure to be a time keeper, or assign one.

**Recorders:** Record the substance of comments. One extra copy of each case and IM will be available if you wish. Give your notes to the case author(s).

**Case Authors:** Prepare some opening remarks that explain why you wrote the case, how you have used it in class, and any issues you are particularly looking for suggestions as to how to improve. Listen to the comments and ask questions.

**Discussants:** [Other authors and participants] Prepare cases thoroughly and participate actively.

There may be participants in your session who are not presenting a case. They are there to observe, to learn, and to participate. Welcome them. Most participants find that these sessions are more enjoyable and collegial than any other type of academic conference they attend. We hope that you will agree, and we have planned the WCA Conference to provide interesting, enjoyable, and instructive activities.

### **AFTER THE WCA CONFERENCE**

Revise your case and IM to improve them. Carefully consider all session comments; some changes may not be appropriate or feasible; you must decide what to change and what not to change. Some suggested data may not be available. However, you are likely to see the more cogent changes you don't make in reviews of your case when you submit it to a journal. Can you defend your choices when you respond to a reviewer? Test-teach the revised case and update your IM based on that teaching experience. Get a colleague to observe your teaching or to teach the case, if possible; he or she will find things you missed or that you know but didn't include. (The author always knows details not included in the case.)

Submit your revised Case and IM to the *Case Research Journal*, the *Journal of Case Research and Inquiry*, or to another journal. Most journal submissions will require at least one revision before acceptance. Failure to revise and resubmit represents the largest reason that submissions to the *Case Research Journal* are not published. If one journal rejects your case, it may be an appropriate fit with another journal. WCA members may have suggestions about which journal would be a good outlet for your case. Once your case is accepted by a journal, or finally rejected, it is then appropriate to submit it to book authors for adoption. Earlier acceptance by book authors disqualifies your case for most journals. Book acceptances often carry merit, depending on your school, but rarely have as much academic credit as acceptance by a peer-reviewed journal.

"How to Get the Most out of the Case Discussion Sessions" was prepared by NACRA authors Timothy W. Edlund and Linda E. Swayne and adapted by Jeff Shay, Stephen McGuire, Duane Helleloid, and Leslie Goldgehn for WCA's purposes. WCA thanks NACRA for use of the document.

# PUBLISHING YOUR CASE RESEARCH

## *Western Casewriters Association*

As it's been said many times before in slightly different ways, *the best case study is a published case study*. Publishing your case in a peer-reviewed journal not only meets the standard of quality expected of all research, but also allows your work to be used by others. That's what you want and that's what WCA wants for you.

For publication outlets for your case research, have a look at the calls for cases on the following pages. For an extensive list of publication opportunities, visit the **WCA Wiki on Case Publishing** at <http://casepublishing.wetpaint.com/> or through the link on our website, [www.westerncasewriters.org](http://www.westerncasewriters.org)



# CALL FOR CASES AND PAPERS

## *Journal of Case Research and Inquiry* Western Casewriters Association

The Western Casewriters Association is proud to announce the launch of a new journal, the **Journal of Case Research and Inquiry (JCRI)** in 2013.

The **Journal of Case Research and Inquiry** seeks submissions of teaching case studies, notes, and articles related to case research and teaching with cases. All submissions to JCRI will be double blind peer-reviewed by at least two reviewers. Published cases, notes, and articles will be available full-text online and free of charge for instructors and students.

**Cases.** The journal seeks cases that address significant contemporary issues faced by organizations and managers in the areas of business and public administration, nonprofit management, and social entrepreneurship. All cases must be submitted together with instructor manuals (IMs). Cases may be derived from primary field research, secondary research, or a combination of both. JCRI does not accept fictional cases, nor cases, notes, or articles previously published elsewhere. We seek cases that will grab students' attention. Cases employing multimedia methods and links to web resources are especially welcome.

**Notes and Articles.** Pedagogical notes that accompany a given case may be submitted to the journal; notes may be summaries of industry characteristics and trends, or theoretical or legal analyses that complement a case. JCRI also seeks scholarly articles addressing significant issues related to case research, case writing, and teaching with cases.

**Submissions.** Authors of cases, articles, and notes should adhere to the submission guidelines posted on the journal website [www.jcri.org](http://www.jcri.org). Submissions and inquiries may be made to the editor at [editor@jcri.org](mailto:editor@jcri.org). Information about the Western Casewriters Association can be found at [www.westerncasewriters.org](http://www.westerncasewriters.org)

# CALL FOR CASES

## *Case Research Journal*

The *Case Research Journal* 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 impacted by an organizational decision, issue, or problem; participant observation; review of primary materials, such as legal proceedings, congressional testimony, or internal company or stakeholder documents) 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 practicable. Cases based entirely on secondary sources will be considered only in unusual circumstances.

The *Journal* also publishes 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 journal editor for instructions.

Deborah Ettington, Editor  
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# CALL FOR CASES

## *The CASE Journal*

*The CASE Journal* invites submissions of cases designed for classroom use. Cases from all business disciplines will be considered. Cases must be factual, and releases must be available where necessary. All cases must be accompanied by an instructors' manual that identifies the intended course, relevant theoretical concepts or models that can be applied, and the research methodology for the case. The instructors' manual should also contain discussion questions and suggested responses, and a teaching plan if not inherent in the Q&A.

*The CASE Journal* also invites submissions of articles relating to case teaching, writing, reviewing, and two new sections have been introduced: Industry Notes and Critical Incidents.

All cases and articles will be subject to a double blind review process. Our review process is developmental, and reviewers will offer suggestions for improvement and revision, where appropriate.

All manuscripts submitted are to be original, unpublished and not under consideration by any other publishing source. To ensure the blind review, there should be no author-identifying information in the text or references. This journal will only accept on-line submissions. Submit your manuscript to the editor by e-mail attachment in MS-Word (.doc format). A separate title page must accompany the paper and include the title of the paper and all pertinent author information (i.e. name, affiliation, address, telephone number, FAX number, and E-mail address). If any portion of the manuscript has been presented in other forms (conferences, workshops, speeches, etc.), it should be so noted on the title page. There is no submission fee; however, at least one author of cases/articles accepted for publication must be a member of The CASE Association.

Cases and articles that have been published in *The CASE Journal* are distributed through Primis and ECCH. Abstracts are available on our website: [www.caseweb.org](http://www.caseweb.org).

Gina Vega, Editor  
Bertolon School of Business  
Salem State College  
Salem, MA 01970

# **CALL FOR CASES**

***Western Casewriters Association Conference***

***March 20, 2014***

**Napa/Sonoma**

**<http://www.westerncasewriters.org>**

The Western Casewriters Association (WCA) Conference is held yearly in conjunction with the Western Academy of Management (WAM).

*Western Casewriters Association*

**CASE SYNOPSES**

**WESTERN CASEWRITERS ASSOCIATION 2013  
CONFERENCE**

## **Abercrombie & Fitch: Standing in a Crowded Market Space**

Hadassah B. Efros (Student Author)  
Lori T. Peterson (Faculty Mentor)  
Cleveland State University

Abercrombie & Fitch, a family of casual, trendy clothing retail brand names, had survived many challenges in its 120-year existence. While the challenges had changed over the years, the issues remained serious. The organization was one of several serving the young adult, college aged consumer. The competition offered similar styles, and was often located in the same general retail space.

This case study introduced some of the major decision making opportunities the current management team was facing, including a difficult financial environment, slow domestic sales with increasing international growth, competing brands within the family targeting similar consumers as well as competition from retailers offering similar product lines, legal issues related to hiring practices and other human resource issues, suggestive marketing techniques, differences between how “corporate” views customers and the customers who purchase and use the retail items and growing discussions of sustainability.

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The authors developed the case for class discussion rather than to illustrate either effective or ineffective handling of the situation. The case, instructor’s manual, and synopsis were anonymously peer reviewed and accepted by the Western Casewriters Association Conference, March 14, 2013, Santa Fe, New Mexico. All rights are reserved to the authors. Contact: [l.t.peterson66@csuohio.edu](mailto:l.t.peterson66@csuohio.edu)

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## **Airworks: Indian Aviation Services Taking Off**

Jyoti Bachani  
Saint Mary's College of California

AirWorks is the largest privately owned aviation services company in India. It has been family owned by the Menon family since 1951, with a new professionally trained top management team brought in since 2010, led by Vivek N Gour. Under his leadership, it has embarked upon a rapid growth strategy, increasing its revenue several fold between 2010 and 2012.

In 2012, AirWorks made a major investment in Empire Aviation of UAE. Vivek led a clean-up job with getting hangers updated, offices set up with processes to document and track and get world class certifications from global regulators such as EASA. He also arranged management training to bring about financial awareness so that the business shifts from 'sell to customers for relationship' to 'sell to make money with relationship'. Vivek believed that you had to be prepared with your resources ready, to seize the opportunity whenever it arrives. This opportunistic approach to strategy in an emerging country in a sunrise industry that has yet to be opened up by the regulators has made AirWorks survive where dozens of others tried and failed.

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## **Blendtec: On-Shoring Blender Manufacturing**

Norm Wright, Eugene Seeley & David Millet  
Utah Valley University

Blendtec is a manufacturer of high blenders and other appliances. In 2009, one of Blendtec's new engineers, proposed making components in the US for better quality and, perhaps, lower cost. The company set up a shop to build the drive shafts for the blenders improved the quality of the components and lowered the cost per unit. With the success of the drive shaft, the company began to look at other components to see if they too can be made in the US or even at Blendtec's factory to improve quality, reduce inventory, and reduce costs.

This case presents proposals for the following components: The blender jar, the blades, the circuit boards, and the power cord. Readers are invited to consider the financial information, existing issues with sourcing in China, and other factors to propose whether each of these components should be sourced from suppliers in China, suppliers in the US, or built in the factory in Orem, UT.

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## **Café Britt: A Costa Rica Pride**

Issam A. Ghazzawi  
University of La Verne

Café Britt, the Costa Rica's leading provider of gourmet coffee, chocolates, and gifts has been on the verge of the second round of growth. Britt's foreign operations sparked by the success of its foreign international airports' operations, truly transformed the company, and made it a true international company. The initial airport operation began in Lima, Peru in 2005 and continued with the opening of Britt shops in the international airport of the Americas in the capital city of Santo Domingo. Later, in August 2011, services began in the airports of Samaná and Puerto Plata in the Dominican Republic.

In January 2012, Britt's CEO Pablo Vargas and the executive management team met to reflect and re-visit the growth strategy. Pablo wanted a comprehensive plan that would sustain Britt's explosive growth for the future. The questions before them were straightforward: How could the international expansion opportunities best be managed? What design choice(s) were available to create an effective organizational structure that could serve as a source of the company's competitive advantage?

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## **Cirque du Soleil: An Innovative Culture of Entertainment**

Issam A. Ghazzawi, Teresa Martinelli-Lee,  
University of La Verne

Marie Palladini  
California State University, Dominguez Hills

Despite its early financial hardship at its early beginning in 1980, Cirque du Soleil (French for Circus of the Sun) remained as one of the most successful stories in the history of the entertainment industry. What started as a troupe of street performers on the streets of Baie-Saint-Paul in Quebec, Canada who named themselves Les Échassiers de Baie-Saint-Paul (French for the Wading birds of Baie-Saint-Paul), has grown into a global entertainment. Cirque du Soleil is a hybrid of circus, acrobatics, and dance performance. This “Circus of the Sun” is a multi-level production without the menagerie of exotic animals, yet is one that captures the magnificence of the human form, agility, and creativity.

With the company traveling across the U.S. and Europe, the success of the organization grew, but not without managerial and organizational disputes including “artistic rebellions” and partnership clashes. The question before its executive management was how to continue enhancing its culture of creativity that enhanced organizational success and sustainability for the future.

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## **EZRA Innovations, LLC**

Joseph R. Bell  
University of Arkansas at Little Rock

Joan Winn  
University of Denver

Michael Geranen and Joe Smith forged a business relationship around a disruptive drug delivery technology that was developed by Dr. Cherng-ju Kim, a researcher and professor at the University of Arkansas for Medical Sciences, College of Pharmacy. After an exclusive licensing agreement was negotiated and then finalized with the University, EZRA Innovations, LLC began the long and arduous process of creating a unique business strategy capitalizing on a flexible and low cost series of technologies that enabled EZRA to compete in the land of giants – the international pharmaceutical industry. EZRA began to position itself by reformulating drugs that were currently available in the marketplace that faced little or no competition. This was only possible because of the drug delivery patents that EZRA had licensed. The aim was to become one of the first generic drug competitors to enter the market, and though putting downward pressure on those drug prices, still maintaining what was referred to as premium-priced generics. While many drugs can cost upwards of \$100 million to develop and take 10 years or more, EZRA’s business model offered an accelerated FDA pathway to market and the potential for exponential investor returns within 4-5 years.

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## **Granulab (D): Positioning Granumas in the Bone Graft Substitute Industry**

Khairul Akmaliah Adham, Rosmah Mat Isa,  
Zizah Che Senik & Norjaya M. Yasin  
Universiti Kebangsaan Malaysia

GranuLab, a private limited company, based in Shah Alam, Malaysia, was a producer of synthetic bone graft substitute, branded as GranuMaS. The company aimed to capture 50-70% of the Malaysian bone graft substitute market by the end of 2015, but by the end of 2012, GranuLab was experiencing low sales performance, and the company had suffered a two-year loss of manufacturing at low capacity.

In December 2012, Mr. Romli and his team pondered on the best strategic option to be pursued by the company to achieve its objective of becoming a dominant player in the Malaysian bone graft substitute industry. This teaching case is designed to stimulate case analysts' thinking on positioning a medical device product within a market which was already conquered by established multinational companies.

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## Ground War Between UPS and FedEx

Kathleen Caparoso, Cecelia Bolden, Laura Cervantes, Kathleen Coe,  
David Kim & Safari Sekiyoba (Student Authors)  
Stephen McGuire (Faculty Mentor)  
California State University, Los Angeles

In the commercial transportation industry, UPS and FedEx represent two of the largest express delivery service firms. UPS and FedEx have been engaged in a battle regarding the laws that regulate their employees' labor rights which in turn affects the ease that employees can unionize. UPS has been lobbying the members of Congress to change the labor designation of FedEx employees to that of UPS. In turn, FedEx has spent millions of dollars to maintain the current labor designation. Currently, FedEx has maintained its position but spending millions of dollars to do so.

Ongoing efforts by the unions to persuade FedEx to unionize actually came from unions themselves. On January 25, 2012 a march on FedEx was held by SEIU, Teamsters, and Good Jobs L.A. in Hollywood, California. The march was patterned after the "Occupy" movement, claiming that FedEx was only paying 1% in federal taxes. Hundreds of workers marched from the CNN building and surrounded the FedEx office, yelling "we are the 99%" and commanding FedEx to deliver its fair share. This was a union tactic that brought negative attention and publicity to FedEx, and put it on the defensive. FedEx countered with a public release of its 2011 tax statements, showing it paid a tax rate between 35.5% and 36.3% and not the 1% claimed by the unions. It remains to be seen how much more it will cost FedEx to defend its labor status in the future.

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# **Institutionalism and Culture in Strategies of Multinational Firms: The Case of Johnson Controls, Inc.**

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Universidad de Guadalajara

The aim of this paper is to analyze both internal and external aspects that may pose a risk to the operations of the subsidiaries of the multinational Johnson Controls Inc. in U.S. and Mexico from the point of view based on institutions; the main challenge to initiate the investigation is do have some impact in the culmination of the goals both of workers and of the same organization?, how to influence the institutions in the organizational environment, for the decommissioning of some branch/ subsidiary. The method used was Analytics to evaluate all the information obtained from the company and thus achieve the objectives required for this research, applied the theory based on the vision of institutions in multinational companies. For results of the analysis, we first had to get to know the real development of multinational enterprises, and then focus on the enterprise objective Johnson Controls Inc.

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# **I've Got a "Tablet" – But I'm Having a Hard Time Swallowing It!**

Simon G. Walls & Rick Mull  
Fort Lewis College

The basic premise or foundation for the case is that it serves as an example of a USA Professor teaching a group of students in Spain. He plans well to integrate technology into his teaching practices. He has much experience teaching overseas and seeks to increase the usage of technology with his students. However, things do not go as smoothly as he had anticipated. From day one difficulties arise and he recognizes very quickly that he will have to find alternative modalities of classroom material presentation. He has to act quickly as the courses are intensive and only a few weeks long.

This case presents an opportunity to put your students in an accurate, real learning and teaching situation. This is an authentic experience that the instructor and his students engaged and worked through. It offers the notion that cultural, technical, preparedness, and other environmental factors out of the instructor's valence of influence can significantly impact classroom technology usage upon arrival in a foreign country. It is never intended to recommend that there is one best solution to the problems posed by the case. Rather, it offers discussion and talking points to find creative ways to resolve the queries as they arise.

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## J.H. Dunning Corporation

John Pappalardo  
Keene State College

For over 100 years J.H. Dunning Corporation had manufactured high quality wooden boxes using the finest woods available. But during the past 20 years the demand for its wooden boxes, cigar cases and bar displays had dropped significantly and the company was in free fall and heading toward certain bankruptcy. Steve Diorio the new VP successfully engineered the company's transition to a custom designer and builder of high end Point of Purchase (P.O.P) display cases for the consumer products industry. But just as things were beginning to look up for Dunning, Steve was diagnosed with a rare form of bone cancer.

This case describes the difficulties faced by a small business attempting to survive in a down economy. Just as the company begins the process of reinventing itself one of the key leadership figures is afflicted with a serious illness that threatens not only his health and wellbeing but also the health and wellbeing of the entire company. The case deals with a number of strategic decisions that must be made as the company attempts to turn itself around. In addition, the case raises questions of how the company's President should handle the incapacitation of a key employee at a critical turning point for the company.

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## Keva Fitness Workout

Lauren Solie (Student Author)  
Stephen McGuire (Faculty Mentor)  
California State University, Los Angeles

What happens when logic and imagination are combined? For entrepreneur Lauren Solie, it could mean a very lucrative business opportunity. Ms. Solie was the owner and creator of Keva Fitness, a new fitness workout that planned to expand through DVD's, certifications, classes, sportswear and much, much more. Given the challenges of creating, funding and starting a new business, is the risk of producing these DVD's too great? What strengths and weaknesses will Ms. Solie have to be aware of in order to enter and succeed in such a large market? How would she get the \$25,000 in funding needed to produce the fitness DVD's, and should people even invest? Does she possess the necessary skills of an entrepreneur?

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# **Light Cost – Heavy Impact: A Case Study of China Light & Power Project in India**

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National Power Corporation Ltd., India

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University of California San Diego & University of Redlands

China Light & Power (CLP) group entered as first independent power producer in Indian power generation sector through international competitive bidding to build and operate a 1320 MW supercritical coal-fired power project in the State of Haryana, India, in July 2008. Marking the occasion, CLP's Managing Director for India, Rajiv Mishra, stated that "The success of CLP's Jhajjar bid underpins our position as one of India's largest foreign investors in the power sector. It also demonstrates the faith we have in growing and reforming states of the country, like Haryana and the ability of the CLP Group to compete in a highly competitive market in a manner that will drive environmental success and sustainable growth." CLP India had indeed emerged as the lowest-priced bidder for the project, winning Letter of Intent ("LOI") from Haryana Power Generation Corporation Limited ("HPGL"). What was the secret of the lowest priced bid of CLP? Was CLP able to launch and commission the project on time and within cost? All bidders, particularly, domestic and many others were wondering and keen to know.

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## **People of Wal-Mart: Targeting the World's Largest Retailer and its Customers**

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Simon Fraser University

Mana Farshid (Student Author)  
Lulea University of Technology

Leyland Pitt (Faculty Mentor)  
Simon Fraser University

In August 2009, the comedy website that presents user-generated content about the bizarre and unusual fashions and sights seen in Wal-Mart, [peopleofwalmart.com](http://peopleofwalmart.com), was conceived by brothers Andrew and Adam Kipple and their friend, Luke Wherry. In this website, people are invited to submit photos of bizarre or poorly dressed Wal-Mart patrons. Website viewers can comment on these photos, and rate these photos.

This case explores a controversial viral business website built around making fun of Wal-Mart's idiosyncratic shoppers. How had the founders, with almost no effort, established a viral website and a money-making platform on the Internet? What was the future of the website – was there room for growth, and were their photo restrictions stringent enough, or should they be concerned about the people who become “feature creatures” on their website? Was it ethical to make fun of the overweight and badly dressed, and, beyond that, was it ethical to make money out of making fun of people? They knew their website was not only insulting the customers, but also to Wal-Mart, and the increasing public exposure raised a question as to the retail giant's attitude towards this website. Did Wal-Mart intend to take action, and if so, what would Wal-Mart do?

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# Promoting Entrepreneurship in Egypt: The Case of the Alexandria Business Association

Juliet Abdelijawad (Student Author)  
Chalmer Labig (Faculty Mentor)  
Oklahoma State University

In the early 90s, the Alexandria Business Association (ABA) received grants to start up a micro-credit division later known as the ABA-Small and Micro Enterprise (SME) division. Since that time, it has tweaked its financial services to include several programs that provide loans and non-financial services to the poor of northern Egypt. Its outreach has grown significantly with operational departments in over seven major cities within Alexandria, Egypt.

The case begins with an overview of the history of non-governmental organizations and their legal status in Egypt. Then it describes the microfinance sector in Egypt and in the region. ABA's products and services are detailed along with information about a small sample of its female clients. The case further delineates challenges these SME borrowers face which hinders their business performance and growth. Since the business climate in Egypt has changed recently due to political turmoil, ABA faces new opportunities to make a positive impact in its communities. The case encourages its readers to think about ways to alter ABA's programs to more effectively meet its clients' needs.

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## RDS Company: Ethical Dilemmas of Consulting

David Bowen & Judith White  
Saint Mary's College of California

The U.S. division of RDS, a European industrial products company, enjoyed eighteen years of steady sales growth, but in recent years communication had deteriorated among the division's executive ranks and between middle management and field sales staff.

Two university professors were hired by the company CEO for a two-stage consulting project. During confidential interviews senior managers nearly all voiced a concern that the CEO wasn't serious about change and the consultants' work might have little payoff. Later, one of the Vice Presidents called to say they did not want their data used in the consulting report. At this point the consultants faced a major decision. If they gave the CEO a report which accurately summarized the data, they could be jeopardizing managers' jobs, but omitting this important information might lead to a report that was considerably watered down. Also, headquarters in Europe wanted to receive a copy of the consultants' report without notifying the CEO. One consultant felt that the interests of all stakeholders was best served by complying, while the other consultant felt that the team's real client was the CEO and they had a moral, if not contractual, obligation to him.

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## Research in Motion: Insight with Hindsight

Andrew Fergus & Tony Bell  
Thompson Rivers University

Founded in 1984 Research in Motion Limited (RIM) is a telecommunications and wireless equipment manufacturer; most notably known for the Blackberry range of products. “Driven by Ideas” is the foundation upon which RIM bases its global growth, and the idea of success through innovation is intertwined throughout the company's culture. Known for secure and innovative products, RIM’s growth was impressive. In a short space of time RIM had grown from a market capitalization of \$500 million in 2002 peaking at over \$75 billion before the economic downturn of 2008.

This case looks at the historical trajectory of RIM and identifies key moments in the dramatic growth and decline of RIM. With hindsight students have an opportunity to consider the mistakes made by RIM, speculate on where and why these mistakes took place, and finishes by challenging them with the task facing the CEO Thorsten Heins - how does RIM turn its fortunes around?

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## **Retain: Managing Growth and Market Share**

Michael McCollough & John Lawrence  
University of Idaho

This case focuses on how Johan Pienaar, Valent Biosciences Corporation Global Business Manager for Plant Growth Regulators, should manage growth of one of the company's most successful products – ReTain. ReTain, when applied to apples and selected other fruits, reduces fruit drop (apples falling from the tress before they could be harvested), provides more consistent premium fruit (larger, firmer, crisper, and better colored apples), and aids in harvest and storage management. Large, sophisticated orchards realized a five to twenty fold return on their use of ReTain, and as a result ReTain had a market share of roughly 65% of the Total Available Market in the US apple industry. Johan's challenge was how to prioritize the various opportunities to grow revenues from the ReTain technology based on application to other fruit (e.g., peaches, pineapples) and in international markets (e.g., China, Europe) while at the same time defending ReTain from several threats (e.g., a much cheaper legacy technology, disagreements about its classification as organic) to its strong market position in the US apple industry.

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## The Shape of Things to Come: A Small Town Gym's Challenge

Deborah Walker & Elaine Labach  
Fort Lewis College

This case is designed to encourage students to think critically through a series of issues dealing with the operations of a fitness center in a small town. Although the business was successful, the owners were still facing some typical problems that a gym in a small community faces. Membership had steadily increased, but was tapering off. The gym was located in a small market. Their main problem dealt with the fact that the gym's market niche was the personal service the owners gave to its members. But as the gym continued to grow, giving the depth of personal service their current members were used to receiving was becoming more and more time-consuming and difficult to accomplish. Therefore, how could they continue to *motivate* existing members and, at the same time, continue to bring in new members while dealing with this service issue? Would the business be as profitable if the owners offered less service and simply sold access and programs the way most gyms do? And, without hiring costly employees, would their current model of contracting with personal trainers and fitness class instructors allow them to grow and give the same personal service they were known for?

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## Telecommunication Problems in Mexico

Neil Geiger, Scott Gimple, Denise McGee & Teri Tompkins  
Pepperdine University

Axtel was a partnership of Bell Canada, Worldtel, and Mexican Investors. Bell Canada sent 100 consultants to Mexico to establish a telephone company. Norma, a consultant for Axtel, was responsible for managing the relationship between the Canadians and the Mexicans because she was the only Canadian who spoke Spanish. During the course of the working relationship, the Mexicans became increasingly upset because the company had established a policy of speaking and writing only in English making it difficult for them to accurately describe their ideas to the Canadians. One day the Mexican staff declared they would no longer conduct business in English. Norma had to resolve the problems between the two groups and decide how to respond to the Mexican client firm's demand to conduct all its business in Spanish instead of English. This case is intended for courses in communication and conflict resolution, in international management, or organizational behavior at the graduate or undergraduate level.

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next year at the*

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