

PROCEEDINGS
WESTERN CASEWRITERS ASSOCIATION
CONFERENCE

The Renaissance Palm Springs Hotel



Palm Springs,
California, USA

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Edited by Andrew Fergus, Ph.D.
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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
Leslie Goldgehn
Duane Helleloid
Anne Lawrence
Teresa Martinelli-Lee
Steve McGuire
Joshua Mindel
Bruce Robertson
Keith Sakuda
V. Seshan
Jeff Shay
James Spee
Teri Tompkins
George Whaley
Joan Winn

WELCOME TO THE CONFERENCE

Welcome to Palm Springs and to the 2017 Western Casewriters Association (WCA) 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.

Michael Valdez (PhD), WCA President, will open our morning session with a welcome and introduction. This will be followed by a short roundtable etiquette presentation by Andrew Fergus (PhD). We will then break into our roundtable discussion groups to discuss our cases and instructor's manuals. Following the review of three cases, Nicole Lawson, Associate Dean for Academic Services, University Library, California State University, Sacramento will be giving the keynote presentation – the focus of the keynote is toward using mulita media in case writing.

After the keynote, we will have lunch with the participants of the Western Academy of Management. After lunch, we will break into our final case and instructor's manual discussion. All case writers should use the roundtable sessions to solicit constructive feedback for improving their cases.

The WCA Business Meeting will take place following the last roundtable discussion. All participants are strongly encouraged to attend. The business Meeting and Reports will be chaired by Michael Valdez (2017 WCA President) and Teresa Martinelli-Lee (Treasurer). We will conclude the conference with reflections on the day as well as with a presentation of rewards which will include awards for best WCA case and best WCA mentored case.

The conference will conclude in time to join the opening session for Western Academy of Management (WAM) conference located in the Ballroom Foyer whereby all WCA attendees are invited to participate. The opening session will be preceded by the WAM Fireside Chat in the Madera Room.

We hope you find the conference rewarding:

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Thompson Rivers University
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WCA 2017, REVIEWERS

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

Tony Bell	Thompson Rivers University
Timothy Clark	W.A. Franke College of Business
Nina O'Brian	California State University, Los Angeles
Michael Valdez	Fort Lewis College
Deb Walker	Fort Lewis College
Andrew Fergus	Thompson Rivers University

WCA 2017, AWARDS PROCESS

Two awards will be given at the Conference. Reviewers reviewed cases as well as nominated cases for best papers.

The first award is for **"BEST CASE"** in the proceedings, for which all submissions are considered, and the second award the **"BEST MENTORED CASE"** for the best case by a student author(s) and faculty mentor.

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

WCA 2017, PROGRAM SCHEDULE

TIME	LOCATION	AGENDA
7:00 to 8:00 am	Catalina Room	WCA/WAM Breakfast
8:00 to 8:45 am	Cactus Room	Welcome (Michael Valdez – WCA President) Roundtable Etiquette & Feedback Process (Andrew Fergus)
8:45 to 9:30 am	Cactus Room	Roundtable Discussions of Cases (1)
9:30 to 10:30 am	Cactus Room	Roundtable Discussions of Cases (2)
10:30 to 10:45 am	Catalina Room	Refreshment Break with WAM
10:45 to 11:15 am	Cactus Room	Roundtable Discussions of Cases (3)
11:15 am to 12:00 pm	Cactus Room	Keynote Speaker: Nicole Lawson Associate Dean for Academic Services University Library California State University, Sacramento T: (916) 278-5430 nicole.lawson@csus.edu
12:00 to 1:00 pm	Catalina Room	WCA/WAM Lunch
1:00 to 1:45 pm	Cactus Room	Roundtable Discussions of Cases (4)
1:45 to 2:15 pm	Cactus Room	<u>WCA Business Meetings & Reports</u> - Treasurer's Report - Treasurer and Co-Chair Assignments <u>Award Presentations</u> - Best WCA Case and Mentored Case - Reflections & Survey Feedback
2:15 to 2:30 pm	Catalina Room	Refreshment Break with WAM
2:45 to 3:30 pm	Cactus Room	WCA Board meeting – Journal of Case Research and Inquiry (JCRI)
3:30 to 4:30 pm	BREAK	
4:30 to 6:00 pm	Madera Room	WAM FIRESIDE CHAT WITH JMI SCHOLARS (Sponsored by College of Business & Economics, California State University, Los Angeles)
6:00 to 7:30 pm	Ballroom Foyer	WAM Opening Reception

WCA 2017, TABLE ASSIGNMENTS

Table	Lead	Authors	Case
1	Michael Valdez	David Hannah, Emily Treen Leyland Pitt	She Grabbed his What?
		Timothy Clark	Guardian Air
		Antoaneta Petkova Xin (Eva) Yao	Medicine Man
		James Downing	Participant
2	Deb Walker	Deborah Walker Simon Walls Nicholas Gerdt Greyson Junggren	Elevate Hammock
		R. Duncan M. Pelly Yang, Zhang Steven McGuire	Home boy
		Lorraine L. Taylor	Hollywood Sign
		Chalmer Labig	Participant
3	Andrew Fergus	Armand Gilinsky, Sergio Canavati Jeffrey Young	Russian River Fidget Cube
		Teresa Martinelli Simon Walls	Marketing Education
		Anthony Bell Andrew Fergus	Peregrine
		Callum Ryan Andrew Fergus	Fidget Cube
4	Nina O'Brien	Jack Suyderhoud	The Pan Group
		Stephen McGuire Ellen Drost Mauricio Cifuentes Christine Zeinali Khodaverdi	Hyperloop
		Nina O'Brien Kate S. Kurtin	Jewish Collaborative of San Diego: Challenges of Organizational Success

WCA 2017, HOW TO GET THE MOST OUT OF THE ROUNDTABLE 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

The 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 (IM's) (aka TN teaching notes). The discussion process is rigorous yet done in a supportive manner. You should expect that the first case discussed, long or short, would 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.

PREPARING FOR CASE ANALYZES & FEEDBACK

The focus should be 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 | TN, 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? Do the IM | TN address these?
- Can the IM | TN 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 timekeeper, or assign one.

Recorder: Document the substance of comments. A copy of each case and IM will be emailed to each table participant. Provide your notes to the case author(s).

Case Author(s): 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.

Discussant: [Other authors and participants] Review cases thoroughly, provide feedback, 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. We have planned the WCA Conference to provide interesting, enjoyable, and instructive activities.

AFTER THE WCA CONFERENCE

Revise your case and IM to develop and improve as needed. Carefully consider all session comments; some changes may not be appropriate or feasible; you must decide what to change and not to change. Some suggested data might not be available. However, you are likely to see the more cogent changes you do not 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. Ask 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 did not include. (The author always knows details not included in the case.)

Submit your revised Case and IM (instructor's manual) | TN (teaching notes) to the Case Research Journal (CRJ), the Journal of Case Research and Inquiry (JCRI), or to another scholarly 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, do not be vexed, as 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. Note however, that any earlier acceptance by book authors disqualifies your case for most journals. Book acceptances often carry merit, depending on your university, but rarely have as much academic credit as acceptance by a peer-reviewed journal.

WCA 2017, PUBLISHING YOUR CASE RESEARCH

As it has 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 is what you want and that is what WCA wants for you.

For an extensive list of publication opportunities, visit “Case Publishing Outlets” through the link on our website, www.westerncasewriters.org.

CALL FOR CASES AND PAPERS - [Journal of Case Research and Inquiry](#)

The Western Casewriters Association is proud to of its own journal, the *Journal of Case Research and Inquiry* (JCRI).

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. Submissions and inquiries may be made to the editor at editor@jcri.org. Information about the Western Casewriters Association can be found at www.westerncasewriters.org

WCA 2017, CASE SYNOPSES

Case synopses may have been edited for length and format.
WCA Authors retain all rights to their intellectual work product; please contact the author(s) for permission to reproduce or use a case.

SHE GRABBED HIS WHAT? A PERSONNEL MANAGER'S DILEMMA

David Hannah, Emily Treen, Leyland Pitt
Beedie School of Business, Simon Fraser University

Case Synopsis

Nick Ramsay was the Personnel Manager for Fletcher's Fine Foods at its head office in Vancouver, British Columbia, Canada. Fletcher's was an 80-year old company and one of Western Canada's oldest and best-known food brands. It was best known for its pork products, including hot dogs, hams, smokies, and deli meats, and these products made up the vast majority of its annual sales of just over \$8 million.

Nick was hired straight out of his undergraduate degree and tasked to manage the 530 unionized employees at the Vancouver operation, which was primarily focused on meat packing. Times were tough in the industry: intense competition among producers meant that low-cost production strategies were the norm, which in turn contributed to the tense labor relations environment in the plant. Over the past year, his first in the job, he had already learned that many strange things happened in meat packing plants. But the story an employee had just told him was the strangest yet.

The case describes the decision-making dilemma faced by Nick Ramsay, a young, relatively inexperienced Personnel Manager. A young, male employee has just met privately with Nick to report that his female co-workers have been sneaking up behind him, reaching between his legs and grabbing his testicles. How should Nick deal with this complaint, keeping in mind the safety and psychological welfare of the employee and his co-workers, his responsibilities to the company, and his personal standing in the company? There is a Case A where the concerned employee's perspective is explained and discussed, and an optional Case B that describes the findings and consequences of the actual decision to conduct an informal investigation.

**GUARDIAN AIR:
CHARTING A DECISION PROCESS FOR NEW HELICOPTER ENGINES**

Timothy S. Clark
Northern Arizona University

Case synopsis:

Reflecting complex realities of real managerial decisions that business majors are likely to encounter early in their careers, this brief case calls for students to develop recommendations on laying out a process for analyzing and making a complex decision – rather than actually making it. Whether to invest in more powerful engines for air-ambulance helicopters, given the life-or-death situations as well as business objectives in the balance, is intended to capture students’ imaginations and stir their best contributions.

Presented as a primarily qualitative task, the case offers only enough quantifiable variables to illustrate how many unknowns must still be secured and analyzed within a comprehensive process. Additional contextual details are given that test students’ skills at filtering the most relevant considerations for this specific task. Such uncertainty is intended to be unfamiliar or even uncomfortable for students of Managerial Decision-Making courses who prefer clean problems and right-or-wrong answers. They may have had little exposure to challenges of this case’s more realistic nature – though tasks of this kind are at least as likely to be what their future work teams encounter and must systematically overcome.

**JEWISH COLLABORATIVE OF SAN DIEGO:
THE CHALLENGES OF ORGANIZATIONAL SUCCESS**

Nina O’Brien, Kate S. Kurtin
California State University, Los Angeles

Case Synopsis

After establishing an alternative synagogue in North County, San Diego, California, the leaders of the Jewish Collaborative of San Diego (JCoSD) were delighted by its growth and success, but knew that they were outgrowing the ad-hoc, cooperative organizational structure at the heart of their community. Having attracted young people, interfaith families, and members from many religious backgrounds who were drawn to a non-hierarchical, inclusive community which seemed to grow organically, JCoSD found itself torn: how could it develop a more professional and efficient structure without abandoning its collaborative philosophy and identity? Further, given the need for community it filled in San Diego, could JCoSD develop a plan to expand to other cities around Southern California and beyond?

PEREGRINE

Anthony Bell, Andrew Fergus
Thompson Rivers University

Case Synopsis

Peregrine, a manufacturer of custom retail displays, had seen its production line slow to a halt when one of the company's two CNC machines broke down. Brian French, the company's president, was determined to relieve the bottleneck. French believed he had three viable options:

- Buy a new CNC machine,
- Lease a new CNC machine, or
- Run an extra shift to keep his current machines working for more hours.

This introductory capital budgeting case requires students to use net present value calculations and consider all three options both qualitatively and quantitatively to make recommendations for French.

MANAGING THE HOST-GUEST RELATIONSHIP NEAR THE HOLLYWOOD SIGN

Lorraine L. Taylor
Fort Lewis College

Case Synopsis

This case introduces the challenges associated with the needs of different stakeholders near the Hollywood sign in California. Tourists want easy access to hike to and take photos near the sign. Local residents want their safety prioritized by restricting non-resident access to the residential streets in their neighborhood. Local business owners value safety but not if restricting access to the Hollywood sign also limits tourists' ability to patronize their businesses. The conflicting interests of all the parties involved have been unsuccessfully resolved by city council representatives as the tension has only continued to grow over the past few years. The case allows students to apply the triple bottom line of sustainability to the destination as a whole.

HYPERLOOP ALPHA, A NEW MODE OF TRANSPORTATION

Stephen McGuire, Ellen Drost, Mauricio Cifuentes,
Christine Zeinali Khodaverdi
California State University Los Angeles

Case Synopsis

This case study is about the comparison of two very different business approaches and how two companies use them to organize work to consolidate a new enterprise. Entrepreneurship involves considerable initiative and risk, especially when creating new products or services. The challenge becomes even more complicated when companies attempt to resolve societal problems. Nevertheless, once the endeavor is undertaken, the final outcome can lead to the creation of masterworks that can become game-changers and disrupt an industry. The only caveat is to select which entrepreneurial methodology is the best to accomplish the original vision.

A very challenging entrepreneurial project is “Hyperloop Alpha” and its ground-breaking technology, which is being developed simultaneously by two companies. These two companies are “Hyperloop One”, and “Hyperloop Transportation Technologies (HTT)”. They both have become the main key players in the race to build the first Hyperloop by 2020. However, they use two different approaches to unravel a problem, organize work, design, develop, finance, and execute this new business endeavor. Hyperloop One uses the traditional startup business model; whereas, HTT uses a combination model of team collaboration and crowdsourcing.

Due to its nature of how to decode a problem and organize work, these two methods create a debate about which entrepreneurial approach is better than the other. Making the Hyperloop a reality and launching its first trip by 2020 constitutes designing, developing, and building a monumental project. Therefore, it is necessary to determine which approach will prevail and be the dominant business model in the future.

HOMEBOY INDUSTRIES: REDEFINING SOCIAL RESPONSIBILITY

R. Duncan M. Pelly, (Faculty Supervisor),
Yang, Zhang, (Student Author),
Steven McGuire, (Faculty Supervisor)
California State University, Los Angeles

“We don’t hire homies to bake bread. We bake bread to hire homies.” Father Boyle
“There’s no question Greg Boyle is a saint, but even saints need good businessmen.” Richard
Riordan, former L.A. mayor

Founded by Father Boyle in 1988, Homeboy Industries, a non-profit organization, aimed to offer alternatives to gang activity and help former gang members or prisoners reenter the community. For the first few years, Father Gregory Boyle, the Jesuit priest who founded Homeboy Industries, focused on job placement for the ex-gang members (or “homies”). However, the number of the homies far outpaced the available jobs. In 1992, Homeboy started its first social enterprise, Homeboy Bakery. At the end of 2015, Homeboy businesses included: Homeboy Bakery, Homegirl Café, Catering, Food Truck, Diner at L.A. City Hall, Airport Bakery, Farmers’ Markets, Salsa and Chips, Homeboyfoods.com, Homeboy Silkscreen & Embroidery and Online Store: Homeboy Apparel & Homeboy Merchandise. Homeboy programs included: Education, Employment, Case Management, Legal Services, Mental Health, Substance Abuse Support, Tattoo Removal, Domestic Violence Intervention Program and Solar Panel Training Program. In spite of all its entrepreneurial success, Homeboy continued to face financial difficulties.

RUSSIAN RIVER BREWING COMPANY IN 2016: CRAFTING STRATEGIES

Armand Gilinsky, Sergio Canavati, & Jeffrey Young
Sonoma State University

Case Synopsis

Vinnie and Natalie Cilurzo became owners of the Russian River Brewing Company (RRBC) in 2003 after its parent company decided to shut it down. From 2004 to 2014 RRBC became one of the most successful breweries in Sonoma County, increased its production fourfold, and won multiple awards, honors, and recognitions for the quality of its beers. By 2015, after paying off all outstanding debt and buying out investors, the Cilurzoes enjoyed the freedom to lenders and investors. The newfound freedom presented the Cilurzoes with the opportunity to craft the strategy of their choice according to their long-term vision for RRBC. The opportunity to freely craft and implement strategy for RRBC was accompanied by the challenge of meeting fast-growing consumer demand while maintaining the focus on quality and consistency that made their brewery an international sensation.

The case lays out the difficult strategic choice faced by the Cilurzoes. In 2016, they identified a property that seemed ideal for building a new brewing plant and brew pub. It became increasingly evident to the Cilurzoes that RRBC's existing production and consumer retail infrastructure could not meet market demand for RRBC's products. However, Natalie Cilurzo wondered if RRBC had the proper technological and human resource infrastructure in place that would be needed for the administrative challenge brought on by expansion. What would be the impact of large-scale growth on consumer perceptions of the quality and value of RRBC's beers? How would the proposed growth in the size of RRBC affect the ability to sustain the firm's recent outstanding financial performance? Are there any operational or human resource challenges that should be addressed before even considering growth and expansion?

**DON'T LEAVE YOUR PRICING STRATEGY HANGING:
THE ELEVATE HAMMOCK COMPANY**

Deborah Walker, Simon Walls (Faculty Supervisors and Authors)
Nicholas Gerdtts (Student Author)
Greyson Junggren (Student Author)
Fort Lewis College – Durango, CO

Greyson Junggren was attending Fort Lewis College in Durango, Colorado and knew firsthand that being an outdoor enthusiast was about embracing nature and creating fun. He also had an entrepreneurial spirit and wanted to make money while he was in college. He hoped that he would be able to sell the company after he graduated in order to start his new life off with a good amount of cash in hand and also a successful business venture on his resume.

He wanted the company to inspire experiences that would bring friends and family together. Therefore, Elevate Hammock Company (EHC) was dedicated to creating high-quality, durable hammocks that were made for the outdoors.

Not knowing much about how to best price his hammocks, when he first started his business, he determined his cost per hammock, which was \$17.00, and then added a mark-up of a little over 200% in order to determine the price he would use for his hammocks. Greyson set his price at \$55.00.

But after some time, he noticed that much of the market was staying with his higher priced competitors. While still generating and growing sales figures, EHC was not acquiring the business from competitors in retail stores that was desired. It seemed to Greyson that potential buyers who could spend \$55.00 on his hammock were willing and able to spend \$85.00 on a competitor's brand. Thus, the retailers had less incentive to sell the Elevate Hammock Company brand. Greyson started to understand there was probably a problem with his price when a very successful retailer in Taos, New Mexico ignored Greyson's suggested retail price of \$55.00 and instead raised the price to \$65.00 and this actually resulted in an increase in the demand for Greyson's hammocks.

It had become clear to Greyson that customers in the outdoor recreation industry were looking for a high-quality product and a higher price seemed to indicate higher quality to them. Because EHC started with a relatively low-price (due to using a cost-plus/competitor pricing strategy), Greyson might have been leaving money on the table.

His initial naïve pricing approach caused Greyson to wonder if he should change his pricing strategy after having been in business for over two years. But what pricing strategy should he use? And what other business strategies should he change or continue with if he does change his pricing strategy? Greyson had a tough decision in front of him.

**MARKETING EDUCATION FOR THE NEXT GENERATION:
AN INTERNATIONAL EXPERIENTIAL FIELD STUDY¹**

Teresa Martinelli, University of La Verne
Simon Walls, Fort Lewis College

CASE SYNOPSIS

The purpose of this study is to offer an international field trip experience that promotes an innovative approach to curriculum, course design, faculty development, and overcome the passive learning often found in the traditional classroom setting. This includes a meaningful technique in marketing education, emphasizing course content and an effective teaching method. The study specifically addresses the development of curriculum, shares an example of applied field tools, and offers a process that has worked well for 10-years allowing ready adoption by readers (Cook & Wolverton, 2002). Indeed, to require student engagement necessitates encouragement of and participatory activities with the instructor to facilitate what Wheeler (2008) categorizes as an active learning experience.

This study hypothesizes the field classroom offers a significant and important learning environment, which seeks to support the nearly century old case teaching methodology. Further, getting students out of the classroom, to actually see and experience the business case, can offer a more meaningful and rewarding learning experience. This study offers empirical support for the suggested pedagogy, shares a rubric for grading, and a model or series of hierarchal steps that can readily be implemented and replicated, to assist faculty wishing to develop an international, yet study abroad experience.

MEDICINE MAN: A PIONEER IN AN EMERGING INDUSTRY

Antoaneta Petkova, Xin (Eva) Yao
San Francisco State University

Case Synopsis

Medicine Man was created in 2009 with the vision to help people have better lives by producing and selling high-quality, low-cost medical marijuana. Despite all the challenges of being a pioneer in the emerging cannabis industry, the company had grown steadily and currently owned and operated one of the first medical dispensaries, the largest single recreational marijuana dispensary in Denver, a second recreational dispensary in Aurora, and a consulting arm – Medicine Man Technologies. With a total of 75 employees, ten of whom family members, Medicine Man still considered itself a family business, and was taking great pride in the quality and affordability of its products.

The case describes the challenges, as well as the benefits, of being a pioneer in an emerging industry. In 2016, Medicine Man was ready for expansion and had several viable options. At the same time, numerous industry-level uncertainties were yet to be resolved. Sally Vander Veer – Medicine Man's President – had to consider the pluses and minuses of each option and decide which direction Medicine Man should take in the next stage of its development.

THE PAN GROUP VIETNAM – FARM TO TABLE WITH SAFETY AND QUALITY

Jack Suyderhoud
Shidler College of Business

Case Synopsis

The PAN Group was started by its Chairman Mr. Hung and Vice-Chair Ms. Tra My in 2013 with a strategy of buying ownership stakes in underperforming and/or high-potential Vietnamese agriculture and food companies, injecting capital, and improving their product quality as well as their financial performance. Their goal was to expand their holdings to make TPG a vertically integrated (farm to table), transparent and accountable company that provided trustworthy products. In addition to expansion via acquisition, Mr. Hung and Ms. Tra My concluded that an in-house R&D capability was required in order to leverage Vietnamese and global knowledge to improve food quality and safety in Vietnam. To that end, in 2016 they brought on board a director of R&D, Dr. Trung Anh.

Experienced in agriculture and food research and with prior business development, Dr. Trung Anh knew there were challenges in how to achieve TPG's R&D goals. TPG was a new player in the industry and was still small relative to other companies in the agriculture/food industry. TPG had no track record of R&D and thus little visibility in the agriculture/food R&D community. Further, TPG's structure as holding company of not-wholly-owned, relatively autonomous operating entities had implications on how to organize and finance TPG's R&D endeavors. Dr. Trung Anh identified several questions he had to deal with:

- How could TPG's R&D arm build its network with external experts and its own subsidiaries?
- What organizational structure would work best? For example, to what extent should R&D be centralized versus distributed in the operating companies?
- How would R&D resources be mobilized and provided? Since TPG was not the soleowner of some of its operating companies, what leverage could TPG use on the operating companies to provide R&D resources and direction?
- How could TPG be sure that resources invested in R&D were being used efficiently?

Dr. Trung Anh himself noted that the connection between TPG and its operating companies was not as strong as he liked. How could he make it stronger? He also worried about how to demonstrate his own capacity.