

# PROGRAM AND PROCEEDINGS WESTERN CASEWRITERS ASSOCIATION CONFERENCE

Originally scheduled at the Hilton Waikoloa Resort  
in Waikoloa, Hawaii on March 19, 2020



Held on June 17, 2020  
by Zoom© Virtual Conference

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Edited by Wayne Singular

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# TABLE OF CONTENTS

## Contents

WCA 2020 SPONSOR.....	3
PRESIDENT’S WELCOME.....	4
WCA 2020 PROGRAM SCHEDULE .....	5
WCA 2020 TABLE ASSIGNMENTS.....	6
Table A .....	6
Table B.....	6
Table C.....	7
Table D .....	7
ABOUT THE WESTERN CASEWRITERS ASSOCIATION.....	8
HISTORY .....	8
2019 – 2020 WCA OFFICERS .....	9
WCA AWARDS PROCESS .....	10
HOW TO GET THE MOST OUT OF THE CASE DISCUSSION SESSIONS .....	11
PUBLISHING YOUR CASE .....	13
CALL FOR CASES, NOTES, AND ARTICLES: JCRI.....	13
CALL FOR CASES: CRJ.....	14
WCA 2020 ACCEPTED CASE SYNOPSES.....	15
Elon Musk: Leader or Liability? .....	15
Humanyze: Behavior and Strategy Under Surveillance? .....	16
Is the Dream for the Kuli Kuli Foods Benefit Corporation Sustainable? .....	17
NRI Distribution: Scaling a Values-Based Culture .....	18
Defensive Entrepreneurship: The Case of R Space.....	19
Adam’s Ribs: An Adventure in Food Cartology .....	20
Honor, Courage, Commitment Online: The Female Navy Officers Facebook Group .....	21
Talk to Amber About Growth.....	22
Bison Brewing: Stumbling Toward Organic Success .....	23
Imagining the Future When Life is Hard Enough .....	24
Dos Hemisferios: Putting High Quality Ecuadorian Wines on the Map.....	25
Busbevmo: Taking Credit for Your Own Success?.....	26
Cluster Analysis of Israel’s Cannabis Industry. Is this a Model for the U.S.? .....	27
Time for A New Car, How Hard Can It Be?.....	28
Do We Shop Until We Drop or Do We Drop Shopping? .....	29
FLAG International, LLC.....	29
NOTES.....	30

## WCA 2020 SPONSOR

The Western Casewriters Association expresses its gratitude to our generous sponsor:



**SCHOOL OF BUSINESS and ECONOMICS**

# PRESIDENT'S WELCOME

Dear Colleagues,

This year, the usual excitement we share in coming together to workshop our cases and learn from one another at the Western Casewriters Conference is eclipsed by the COVID-19 virus, its spread, and our concerns for family, friends, colleagues and the global community. I write with sincere wishes that each of you are all keeping healthy, safe, and taking precautions around social distancing, handwashing, and checking in on the physical and psychological well-being of the most vulnerable among us.

Our time together also occurs alongside renewed and necessary struggles around and focus on issues of racial, social and economic justice. As scholars, we have vital roles to play in these conversations: with our students, colleagues and with the audiences of our written scholarly work, including our case work. I am grateful to spend this virtual time with you, and to beginning and advancing discussions about how this organization and our members can contribute to a larger social justice agenda within the academy.

The Western Casewriters Association was founded with the mission to help train, develop, and support case writers. We strongly believe in creating a supportive environment that encourages people to start, develop and write interesting business cases. We believe in a mentoring culture where the more experienced members share their insights and ideas with new case writers to continue the development of our field.

This year, our virtual conference, lovingly arranged by Wayne Singular, represents a new way to continue that mission. As writers, colleagues and friends, we come together to provide feedback, share ideas and push each other forwards. I am excited to see all of you, and to see how this experiment in distance collaboration plays out.

As casewriters, scholars and teachers, there is no one better prepared to reflect thoughtfully, investigate carefully and come together as a community than the members of the Western Casewriters Association. Thank you for all you do to make this community a source of strength in challenging times and a source of support for one another and our communities.



Nina O'Brien  
President, Western Casewriters Association

# WCA 2020 PROGRAM SCHEDULE

<b>Wednesday, June 17, 2020</b> (All times Pacific Daylight Time) <i>Note: The Zoom main meeting is set to run continuously from 7:00 am to 5:00 pm</i>		
<b>Time</b>	<b>Location</b>	<b>Agenda</b>
7:00 – 8:00 am		Bring Your Own Breakfast
8:05 – 8:25 am	Zoom – Main <sup>(a)</sup>	Welcome (Nina O’Brien, President of WCA) Roundtable Etiquette & Feedback Process (Wayne Singular, WCA Program Chair)
8:30 – 9:25 am	Zoom – Breakout Tables A, B, C, D	Roundtable Discussions of Cases (1)
9:25 – 9:40 am		Break
9:40 – 10:30 am	Zoom – Breakout Tables A, B, C	Roundtable Discussions of Cases (2)
10:30 – 10:45 am		Break
10:45 am – 12:00 pm	Zoom – Breakout Tables A, B, D	Roundtable Discussions of Cases (3) and wrap up of case discussions (return to earlier unfinished discussions if needed.)
12:00 – 1:00 pm		Bring your own Lunch
1:00 – 2:15 pm	Zoom - Main	Award Presentations - Best WCA Case - Best Mentored Case Reviewer Appreciation Reviewer Invitation (WCA and JCRI) Choose WCA Program Chair for 2022 Conference
2:15 – 3:00 pm	Zoom - Main	WCA Board Meeting: - <i>Treasurer's Report</i> - <i>Journal of Case Research and Inquiry</i> - <i>Other New Business</i>

Notes: a) Zoom Meeting ID: 868 3003 7750 - Password: 985623 – Direct Link to Zoom Main Meeting: <https://us02web.zoom.us/j/86830037750?pwd=c3AyQkZ4S1JINGU5TXc0QW9JTGJZdz09>

# WCA 2020 TABLE ASSIGNMENTS

**Leads:** Please arrange for a notetaker for each case discussion and keep an eye on the clock to ensure that all cases receive thoughtful and thorough feedback. The order of case discussions may be changed to accommodate the needs of participants.

## Table A

Lead	Author(s)	Case
<b>Jyoti Bachani</b>	Franziska Renz Julian Vogel, (The University of Texas at El Paso)	<b>1) Elon Musk: Leader or Liability?</b>
	Houhou Kevin Xu Stephen McGuire Andre Avramchuk (California State University Los Angeles)	<b>2) Humanyze: Behavior and Strategy Under Surveillance?</b>
	George Whaley (San Jose State University)	<b>3) Is the Dream for the Kuli Kuli Foods Benefit Corporation Sustainable?</b>

## Table B

Lead	Author(s)	Case
<b>Duane Helleloid</b>	Melanie Reed (Thompson Rivers University)	<b>1) NRI Distribution: Scaling a Values-Based Culture</b>
	Lorraine Taylor Stephanie Owings-Edwards Elizabeth Cartier (Fort Lewis College)	<b>2) Defensive Entrepreneurship: The Case of R Space</b>
	Lisa Eshbach (Ferris State University) Nancy Levenburg (Grand Valley State University)	<b>3) Adam's Ribs: An Adventure in Food Cartology</b>

Table C

Lead	Author(s)	Case
<b>Teresa Martinelli</b>	Kathryn Aten Anita Salem (Naval Postgraduate School)	<b>1) Honor, Courage, Commitment Online: The Female Navy Officers Facebook Group</b>
	Claudia Barrulas Yefremian Josue Arvayza Nina O'Brien (California State University Los Angeles)	<b>2) Talk to Amber About Growth</b>
	<b>Join Table D for this block</b>	

Table D

Lead	Author(s)	Case
<b>Andrew Fergus</b>	Lori Peterson (Northeastern State University)  Jeffrey English (Saint Xavier University)	<b>1) Bison Brewing: Stumbling Toward Organic Success</b>
	<b>Join Table C for this block</b>	
	Teresa Martinelli (University of La Verne)	<b>3) Imagining the Future When Life is Hard Enough</b>

# ABOUT THE 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 case writers 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. Participants at the conference will have their cases reviewed by other authors. The objective is to help participants move their cases towards journal publication.

## HISTORY

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 roundtable format since then to help train, develop, and support case researchers.

Past presidents of the organization include:

Sally Baack  
Jyoti Bachani  
Issam Ghazzawi  
Leslie Goldgehn  
Duane Helleloid  
Anne Lawrence  
Teresa Martinelli  
Steve McGuire  
Joshua Mindel  
Bruce Robertson  
Keith Sakuda  
V. Seshan  
Jeff Shay  
James Spee  
Teri Tompkins  
Michael Valdez  
George Whaley  
Joan Winn  
Andrew Fergus  
Deborah Walker

## 2019 – 2020 WCA OFFICERS

President: **Nina O'Brien**, California State University, Los Angeles

President Elect & Program Chair 2020: **Wayne Singular**, Thompson Rivers University

Treasurer: **Teresa Martinelli**, University of La Verne

## 2020 WCA REVIEWERS

This conference would not be possible without the dedication contribution of our many reviewers who provide thoughtful, thorough, constructive and timely feedback on cases. **Thank you so very much for your valuable service to WCA!**

**Kathryn Aten**, Naval Postgraduate School  
**Anthony Bell**, Thompson Rivers University  
**Elizabeth Cartier**, Fort Lewis College  
**Ellen Drost**, California State University Los Angeles  
**Lisa Eshbach**, Ferris State University  
**Andrew Fergus**, Thompson Rivers University  
**Issam Ghazzawi**, University of La Verne  
**Soojung Han**, California State University Los Angeles  
**Duane Helleloid**, University of North Dakota  
**John Lawrence**, University of Idaho  
**Nancy Levenburg**, Grand Valley State University  
**Kent Lutz**, University of Cincinnati  
**Theresa Martinelli**, University of La Verne  
**Jacob Massoud**, Dominican University of California  
**Mike McCollough**, University of Idaho  
**Steve McGuire**, California State University Los Angeles  
**Michael Merenda**, University of New Hampshire  
**Jana Noskova**, Thompson Rivers University  
**Asbjorn Osland**, San José State University  
**Robert Perkins**, University of West Florida  
**Melanie Reed**, Thompson Rivers University  
**Franziska Renz**, The University of Texas at El Paso  
**Anita Salem**, Naval Postgraduate School  
**Nancy Southin**, Thompson Rivers University  
**Lorraine Taylor**, Fort Lewis College  
**Michael Valdez**, Fort Lewis College,  
**Deborah Walker**, Fort Lewis College  
**George Whaley**, San José State University

# WCA AWARDS PROCESS

Two awards will be given at the WCA Conference this year. Reviewers reviewed cases as well as nominated cases to receive an award. The Conference chair then reread the cases that were nominated in order to determine the winners in consultation with WCA officers. This was a very difficult process, there were many very good cases submitted to the Conference this year.

The first award presented at the Conference will be the “Best Case Award”, for which all submissions are considered. The second award presented at the Conference will be the “Best Mentored Case”, which recognizes the best case written by a student author(s) with the guidance of a faculty mentor.

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

## 2019 Award Winners

### Best Case Award:

Mostly Mental Shuttles: Now is the Time to Grow

**Wayne Singular**

Thompson Rivers University

### Best Mentored Case:

Los Angeles Apparel: Growing Pains

**Ezra Pugh** (Student Author)

**Ellen Drost** (Faculty Mentor)

California State University Los Angeles

## 2018 Award Winners

### Best Case Award:

Ashokan Center: Fostering Deep Connections

**Michael Merenda**

University of New Hampshire

### Best Mentored Case:

Brewerkz: Brewing What Works Best

**Shreshthi Mehta** (Student Author)

**Julia Ivy** (Faculty Mentor)

Northeastern University

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

The Western Case Writers Conference (WCA) is a developmental workshop. Each person contributes to each case discussion and in turn receives feedback from each other person at their roundtable. Participants' preparation prior to the WCA and active participation at the WCA 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 of the WCA 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) (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 ANALYSES & 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 instructor's manual 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 (typically the sequence that is on the Table Assignments document is followed). 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 (if you have), and any issues you are having with the case. Listen to the comments and ask questions.

**Discussants 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 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 to the *Journal of Case Research and Inquiry* (JCRI), the *Case Research Journal* (CRJ), 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.

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“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. Some edits were made by Deborah Walker in 2018. WCA thanks NACRA for use of the document.

# PUBLISHING YOUR CASE

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 a list of publication opportunities, visit “Case Publishing Outlets” through the link on our website, [www.westerncasewriters.org](http://www.westerncasewriters.org).



## CALL FOR CASES, NOTES, AND ARTICLES: JCRI

The *Journal of Case Research and Inquiry* (JCRI) is the peer reviewed online publication of the Western Casewriters Association (WCA) and is listed in *Cabell's Directory of Publishing Opportunities*. The JCRI publishes (1) TEACHING CASE STUDIES in business and public administration, nonprofit management, social entrepreneurship and economic policy; (2) NOTES - industry or theoretical analyses to accompany cases; and (3) ARTICLES on case research and teaching with cases.

JCRI publishes cases, notes, and articles online. That way they are available full-text and free of charge to educators and students. Educators are encouraged to place in their syllabi links to JCRI cases, notes, and articles.

Authors should review the JCRI submission guidelines by visiting JCRI's web page <http://www.jcri.org/>. Authors may contact the editor, Steve McGuire or associate editor, Deborah Walker, at [editor@jcri.org](mailto:editor@jcri.org).



# NACRA

NORTH AMERICAN CASE  
RESEARCH ASSOCIATION

## CALL FOR CASES: CRJ

The *Case Research Journal* (CRJ) is published by the North American Case Research Association (NACRA). The CRJ is the leading academic journal for cases in business and related disciplines in North America. The Case Research Journal publishes outstanding field-research-based, decision focused teaching cases drawn from research in real organizations, dealing with issues in all administration-related disciplines. Occasionally, the Journal publishes papers concerning case research, case writing or case teaching. All manuscripts are double-blind refereed by Editorial Board members and ad hoc reviewers.

The journal publishes four issues a year and has an acceptance rate of approximately 20 percent. Cases published in the CRJ are distributed directly to libraries and subscribers and online through NACRA's publishing partners, including, Harvard, Ivey, The Case Centre, McGraw-Hill Create, Pearson Collections, and Study.net. Authors should review the CRJ submission guidelines by visiting NACRA's web page <https://www.nacra.net/case-research-journal/>.

Authors may contact the editor, Gina Grandy at [crj.editor@uregina.ca](mailto:crj.editor@uregina.ca) if they have questions.

### **UPCOMING SPECIAL ISSUES**

Special issue on **MULTIDISCIPLINARY CASES**

Submission Deadline October 31, 2020

# WCA 2020 ACCEPTED 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.

## Elon Musk: Leader or Liability?

Franziska Renz

Julian Vogel

(The University of Texas at El Paso)

### **Case Synopsis**

“So, in short, the master plan is:

Build sports car

Use that money to build an affordable car

Use that money to build an even more affordable car

While doing above, also provide zero emission electric power generation options  
Don't tell anyone.” (Musk, 2006)

This was the master plan of Elon Musk, Co-Founder and CEO of Tesla, Inc., which was initially Tesla Motors. He shined as the financier and promoter of clean and affordable innovation, especially in the automotive industry (Musk, 2006). Musk advanced humanity as the Founder and CEO of SpaceX (SpaceX, 2013) and supported philanthropic projects such as the Thailand cave rescue (Liptak, 2018). Certainly, he became an important figure of popular culture and was referred to as the “real-life Iron Man” (Blumenthal, 2016; Hern, 2018). However, Musk also attracted controversy when he smoked cannabis on a podcast (PowerfulJRE, 2018) or took on the German automotive industry (Chazan, 2019), Martin Eberhard – the former CEO and Co-Founder of Tesla, Inc. (Rapier, 2019; Squatriglia, 2009), and the U.S. Securities and Exchange Commission (Goldstein & Flitter, 2018; O’Kane & Lopatto, 2018; Reuters, 2018a).

These antagonistic behaviors put Musk’s leadership qualities in question. Was he a charismatic leader or did his impulsive personality interfere with his genius? Was Musk a source of sustained competitive advantage for Tesla, Inc., or did he harm the company’s attractiveness to investors? In short, was Musk a leader or a liability?

## Humanyze: Behavior and Strategy Under Surveillance?

Houhou Kevin Xu  
Stephen McGuire  
Andre Avramchuk  
(California State University, Los Angeles)

### **Case Synopsis**

Humanyze was a company that specialized in analyzing employee-related data to help its clients answer specific questions about improving business performance. It was founded in 2011 in Boston, Massachusetts, by then MIT Ph.D. students and their professor. With offices and customer service hubs in Boston, Houston, Palo Alto, Amsterdam, and Tokyo, Humanyze successfully provided novel solutions via organizational analytics, business process optimization, and space design and planning to a number of Fortune 1,000 companies. To render these valuable services, it used information about employees, sometimes through wearable devices recording every move or interaction pattern. It valued aggregating the anonymous data and allowing employees to opt-in rather than being subject to any mandated participation. It wanted to expand worldwide its pioneering role in organizational analytics.

The precision and benefits of Humanyze's solutions, though profit-generating for the client companies and work-condition-improving for some employees, might still not sit well with the watchdogs of employee privacy and corporate social responsibility. How much of themselves should employees give up at work, and would they proportionally benefit in return? Could Humanyze safely increase its market reach to the largest employers and effect positive change for the workers en mass? What should Humanyze's next strategic steps entail?

## Is the Dream for the Kuli Kuli Foods Benefit Corporation Sustainable?

George Whaley  
(San Jose State University)

### **Case Synopsis**

The CEO of Kuli Kuli Foods discovered the health benefits of the nutrient-rich moringa plant while serving in the Peace Corps in Niger, West Africa. She dreamed that a company based on this plant could serve a business and social purpose and founded Kuli Kuli, a mission-driven super food business, after returning from a stint with the Job Corp. Kuli Kuli extended its social impact footprint and became certified as a B Corporation (BC) through the third-party B Laboratory. The firm grew exponentially with hard work and the financial assistance of loans, crowdfunding, and venture capital.

As a result, the firm and the CEO won numerous social entrepreneurship, humanitarian, and leadership awards. During her flight to Palm Springs, California in November 2019 to accept another best practices award, the CEO ponders whether she could sustain these past successes over the next five years. Students are asked to make recommendations to sustain Kuli Kuli over the next five years in light of a recent decrease in sales, increased supply chain risks and her concern about product competition as well as the need for increased market penetration based on the B Corporation brand.

## NRI Distribution: Scaling a Values-Based Culture

Melanie Reed  
(Thompson Rivers University)

### **Case Synopsis**

Developing a values-based culture in a single location organization is challenging enough for leaders. It takes clarity of those values, clear definitions of expected behaviors, alignment to policies, programs and practices and a great deal of perseverance and communication. However, in a fast-growing and rapidly expanding organization that crosses borders and time zones, this can be monumental. Nevertheless, NRI Distribution, a 22-year old company in the 3PL industry based in Kamloops, B.C., Canada, was cutting their teeth on the challenge of scaling a unique and powerful values-based culture as they rapidly expanded into new markets in Southern California and Montreal.

This case provides an overview of how the company developed and sustained its values-based culture through its People Experience function and the actions of the Senior Leadership team and outlines the challenges the company faced when they entered a new and unfamiliar market in Southern California. The case begins with a brief history of the organization and the leaders who were instrumental in developing the culture, including Dean Stainton, People Experience Director and Carly Gordon, People Experience Manager, who have both been with the company for over a decade. The case then provides students with the steps the leadership team took to develop and implement a culture shift using values. It then describes the challenges the organization and team faced when the culture did not quickly scale in the new location and the lessons they learned along the way. The case challenges students to identify the strategies used to implement and embed a values-based culture as well as explore possible strategies that would help the organization continue to scale at a rapid pace and maintain the values-based culture the company was founded upon.

## Defensive Entrepreneurship: The Case of R Space

Lorraine Taylor  
Stephanie Owings-Edwards  
Elizabeth Cartier  
(Fort Lewis College)

### **Case Synopsis**

Kirk Komick had co-owned the Rochester Hotel and Leland House boutique properties in Durango, CO for 25 years. The Rochester Hotel consistently maintained the top spot in guest ratings on TripAdvisor and Komick was known for his active role in supporting the community. In 2016, he was faced with a decision when the location next door to his hotel properties went up for rent. Concerned that a marijuana store or tattoo parlor would be the most likely future occupant, he sought to defensively acquire the location and build a complementary business that would protect his hotel assets.

After doing some research, Komick decided to open R Space, a coworking facility that would provide a resource to both his hotel guests who were traveling for business and to the local community and its budding entrepreneurs. After 2 years, R Space was being managed by a full-time staff member but had achieved little financial success itself, though Komick perceived it as a success both in its ability to preserve his increasing profit from the hotels and also in its contribution as a resource to the community. What would the future hold for a business that was really brought to life simply as a defensive entrepreneurship strategy?

## Adam's Ribs: An Adventure in Food Cartology

Lisa Eshbach  
(Ferris State University)

Nancy Levenburg  
(Grand Valley State University)

### **Case Synopsis**

Weary from working 14 hours a day as a sous chef at Crosswater Club in Sunriver, Oregon, Chef Adam was contemplating becoming his own boss and starting a food truck business (most likely a Texas-style barbecue) in Bend, Oregon. Adam's wife, Mary, worked as an executive chef at Whispering Winds in Bend, an assisted living facility. They were a newly married couple and were very cost-conscious with respect to household expenses. They have about \$20,000 in savings that could be devoted to purchase a new (not equipped) or used (fully equipped) food truck.

Adam and Mary lived in the right location to start a food truck business. Although the region encouraged an "entrepreneur-friendly" environment, Adam faced intense competition within the food truck industry in Bend, OR. There were already 120 "established" food trucks in Bend that served local customers. Nevertheless, Adam was encouraged because, based on his research, none offered a Texas-style barbecue menu. He believed that if he could overcome the fierce competitive factors, comply with the licensing and regulations as well as obtain enough cash to start the business, he could be successful.

The case provides a general overview of the factors involved in starting a new food truck business – location, demographics, customer preference, licensing/regulations, product branding and other personal related considerations. It deals with the very early stages in new venture planning – ideation – and essentially poses the question, is the fundamental business concept viable? What issues must be considered?

## Honor, Courage, Commitment Online: The Female Navy Officers Facebook Group

Kathryn Aten  
Anita Salem  
(Naval Postgraduate School)

### **Case Synopsis**

LT Janice Walker was a female Navy officer, working in the Navy's, Office of Women's Policy and member of the Navy-sponsored Female Navy Officers Facebook group. The group was created with Navy support at a time when the Navy was experimenting with social media as an inexpensive way to provide information to sailors. Shortly after she became the administrator of the site, a scandal broke around a non-sponsored, but Navy affiliated site called Marines United. Though intended to provide online support for active duty service members and veterans, interactions on the site veered drastically from that purpose. The site became dominated with racial slurs, jokes about rape, and revenge porn. An investigation identified 119 individuals involved in inappropriate or illegal behavior, 97 of them Marines. As of March 1, 2018, seven Marines were court martialed and another 48 received lesser sanctions. In response to this and other events, the Navy curtailed official Navy sponsorship of the Female Navy Officers Facebook group.

The case describes LT Walker's efforts to continue and monitor the site, focusing on the friction between encouraging participation and maintaining control. Scandals related to online communication among military and government employees demonstrated the challenges of controlling interactions on unofficial social media sites. The volunteer administrators relied on the Uniform Code of Military Justice and the fundamental values of the Navy—Honor, Courage, and Commitment—to drive the tenor of social interactions on the Facebook group site. This challenge became increasingly difficult in the social media climate following the election of President Trump. Additionally, the Commander and Chief used social media for communication about Navy affairs and to criticize leaders and lawmakers in what many considered an inflammatory style. The case asks students to consider the risks and benefits to the Navy of an unaffiliated Facebook group and make recommendations to LT Walker.

## Talk to Amber About Growth

Claudia Barrulas Yefremian  
Josue Arvayza  
Nina O'Brien  
(California State University, Los Angeles)

### **Case Synopsis**

Amber L. Wright was an African-American entrepreneur and the founder of Talk to Amber, a communications consulting and coaching practice focused on inspiring people to communicate with confidence and quality. Amber believed that life was a conversation, and she wanted to guide people to build better lives through better communication. However, doing it alone as an entrepreneur proved to be a steep road with many risks and uncertainties.

In 2018, after two years of full-time commitment, Talk to Amber almost came to a stop. All of a sudden, she lost her income stream, and there were no immediate business prospects. Amber knew that if she was determined to continue her practice, it was imperative to create new revenue streams to ensure financial sustainability and stability over the long term. However, how could Amber go about it? What could she do?

## Bison Brewing: Stumbling Toward Organic Success

Lori Peterson  
(Northeastern State University)

Jeffrey English  
(Saint Xavier University)

### **Case Synopsis**

Bison Brewing (Bison) was an organic beer company based in California. Bison was one of the first beer brewers to transition all of their recipes to 100% organic, and non-GMO ingredients. Bison also became one of the first beer brewers to achieve the status of Certified Benefit Corporation (CBC) by B Labs in 2009, as the firm pursued goals that were socially conscious and not purely profit-oriented.

Upon re-certification as a CBC in 2016, Bison Brewing was named as one of the “Best for the World” firms by B Labs. However, the organic beer industry was not an easy road for Bison and the firm faced a crossroads. Should Bison Brewing continue to pursue a social organizational logic, or a more commercial-oriented logic? Could Bison Brewing continue to pursue both logics (which are often at-odds) and maintain a thriving business? Or did they have a good run, and should they close their doors?

## Imagining the Future When Life is Hard Enough

Teresa Martinelli  
(University of La Verne)

### **Case Synopsis**

The purpose of this management and public administration case is intended for class study, whereby the application of concepts can provide learning to complement knowledge and give an example of how public and community problems can be encountered and actions taken. This case is designed to help improve the readers' own experience in which likely homelessness is increasing among their communities or perhaps those cities they visit in other locations. This case was integrated into a graduate level Management and Leadership course in which student coursework required, yet enabled students to experience in-depth analysis, discussion, and experience current and glaring real world problems and strive to find applicable solutions if not globally, yet at least locally.

The standards of this case are to offer an illustration of scores of cities in which homelessness rages unabated even as the ebb and flow of urban landscapes remains in constant flux. As such, the reader is provided with an authentic, real-life situation based on interviews with those who sleep under the stars and those who sleep under a roof including its accompanying problems. The dynamics of the case is triangulated by this researcher who is from an institution of higher education in Southern California, yet who lives in the State of Washington. This case is timely given the living complexities of our global environment. The realities of the case being brought to the classroom, is meant primarily as awareness, while at the same time seeking to place the reader-learner in the conditions faced by both communities and the indigent. In seeing the possibility of being homeless oneself, and recreating the experiences encountered, the reader-learner can begin to comprehend the conditions both active and torpid to offer alternative solutions and to strategize both short-and long-term.

## Dos Hemisferios: Putting High Quality Ecuadorian Wines on the Map

Jacob A. Massoud  
Vafa Saboori-Deilami  
(Dominican University of California)

### **Case Synopsis**

The Ecuadorian winery, Dos Hemisferios, had started out as a hobby in 1999, but quickly grew into a business and passion for the Wright family. After receiving an international award in 2009 for their Cabernet Sauvignon-Malbec blend called Paradoja, the winery realized its potential and made the decision to expand its vineyards and production of wines. The company invested \$10 million in a new plant in 2017, which provided the capacity to produce 500,000 bottles per year. This would bring Dos Hemisferios closer to its goal of 600,000 units of production by 2020. Robert Wright, the Dos Hemisferios President, knew that the business would need to increase its sales significantly to finally reach profitability. In order to break even, he had estimated they would need to increase annual sales from about 250,000 units to at least 350,000 units. As part of their strategy to increase sales, Robert and his father, Guillermo Wright, developed a rebranding proposal for the next board of directors meeting. This rebranding initiative hinged on the belief that people in the Ecuadorian wine market did not know much about wine. To address this issue, they decided to be more specific in terms of what each of the Dos Hemisferios brands represented and to whom each would be sold.

Additionally, Quito represented the largest wine market in Ecuador. In dollars, the Quito market comprised 46% of all wine sales. This market was important for Dos Hemisferios on several fronts, but primarily because it had the largest market potential in terms of size. Recognizing the opportunities for growth in Quito, Robert and his team sought ways to boost total revenues in Quito to \$50,000 per month. However, the market posed several challenges, including a lack of awareness about Ecuadorian wines at bars, restaurants, cafés, and hotels and an unwillingness to try Ecuadorian wines. Robert understood that overcoming this negative mental paradigm and creating awareness about Ecuadorian wines would be critical for Dos Hemisferios moving forward. Robert wondered if the rebranding proposal they had prepared would be effective and if any other strategies should be considered to improve sales.

## Busbevmo: Taking Credit for Your Own Success?

Irene Ng  
Norman Bautista  
Soojung Han  
(California State University, Los Angeles)

### **Case Synopsis**

After reviewing the wine department's sales figures, the BevMo store manager, John Clayton, saw several opportunities for improvement. In the wine department, one particular area of concern was the decreasing sales in the rosé wine section. John challenged Jennifer Nelson, the supervisor, to increase rosé wine sales by the end of the quarter. Jennifer accepted the task. She saw this as a perfect opportunity to showcase her skills and capabilities as a competent leader. Jennifer relied heavily on Caitlin Lee, a part-time associate, to achieve success. Jennifer implemented Caitlin's ideas that contributed to a significant increase in sales of rosé wine. However, John, Jennifer's manager, believed all the ideas originated from Jennifer herself. John credited her as a genius. Jennifer needed to decide between giving credit to her subordinate or going along with John Clayton's misperception, that is, taking recognition for Caitlin's contribution.

Should Jennifer admit that Caitlin had come up with the ideas that raised rosé wine sales? What other alternatives did Jennifer have? How should Jennifer make an ethical decision for this issue and arrive at a win-win situation?

## Cluster Analysis of Israel's Cannabis Industry. Is this a Model for the U.S.?

Asbjorn Osland  
(San Jose State University)

### **Case Synopsis**

Doctors in the U.S. can prescribe Epidiolex, the only cannabis-related product approved by FDA, in the treatment of epilepsy. In states where medical marijuana is legal, vendors sell it to customers in a comparable manner that companies sell vitamins or supplements, with fewer regulations than pharmaceutical products (Mirsky, 2019, May 10). In contrast to the U.S. where pharmacological research using cannabis related chemicals is lacking, Israeli organizations are conducting numerous scientific studies on the pharmacological value of cannabis (Rosner, 2019, March 4). Israel is an international center for research into pharmaceutical applications based on cannabis as well as its cultivation. Israel's government was supportive of medical marijuana and recreational use was decriminalized (Kubovich, 2017). It wants to be a leader in medical marijuana, not an exporter of a recreational drug (Mitzner, 2015). FDA approved clinical trials of pharmaceutical research into the medicinal qualities of cannabis are critical and lacking in the U.S. Such R&D would enable medical marijuana to advance from its very crude state where the botanical plant is smoked or ingested in another manner. It could be refined to medicine focused on a particular illness where scientific research has shown the efficacy of specific molecular attributes of cannabis. Without such research, people are largely getting high from "medical" marijuana (California Police Chiefs Association, 2009). Anecdotal reports, from ingesting botanical marijuana, of pain relief, nausea reduction and the like are of course important. A cluster analysis of the cannabis industry in the U.S. would be lacking this critical R&D component, without which cannabis is just another way to get high. Therefore, we will focus on Israel where the vital R&D portion of the cluster is present.

## Time for A New Car, How Hard Can It Be?

Tony Bell  
Andrew Fergus  
(Thompson Rivers University)

### **Case Synopsis**

Reddit.com user “ITT” needed advice, he was debating whether to keep his existing 2007 Chevrolet Impala or replace it with a second-hand 2013 Nissan Leaf. He posted the following question on reddit’s Frugal forum: “Theoretically, would a Nissan Leaf be the least expensive car for me to own?”

The response from Reddit commenters was overwhelming, after twelve hours and over 300 comments (many in direct opposition to each other), ITT was more confused than when he had started. He was looking for answers, but after scrolling through pages of spirited debate, he was no closer to reaching a decision – should he keep his old car, or replace it?

## Do We Shop Until We Drop or Do We Drop Shopping?

Michael A. McCollough  
(University of Idaho)

### **Case Synopsis**

The case involves an important decision that Wildcat Solutions, a student run business at the Inland Empire University, must make. The students must decide if they want to keep secret shops, a challenging and unpopular product that is nevertheless an important source of revenue for the class.

## FLAG International, LLC

John Stocker  
Jennifer Zelvin McCloskey  
(University of Delaware)

### **Case Synopsis**

This case illustrates what can go wrong when a small highly successful international consulting firm bets big on a project in Afghanistan financed by an SBA guaranteed loan issued by a local bank. As one of the most dangerous places in the world and one of the most difficult places to do business the venture failed with catastrophic results for the firm. After seven years of attempting to dig themselves out of the hole created by the failed venture the principals needed to either restructure the outstanding loan balance or close up shop. Complicating the situation was the possibility that a former partner may be held liable for the current debt.

# NOTES