SWCRA
SOUTHWEST CASE RESEARCH ASSOCIATION

ANNUAL CONFERENCE PROCEEDINGS

LITTLE ROCK, ARKANSAS
March 8-11, 2017

Editor
Irfan Ahmed
Sam Houston State University

Contents

History of the Southwest Case Research Association (SWCRA)

The origin of the Southwest Case Research Association was due to the efforts of the members of the North American Case Research Association (NACRA) to sponsor workshops at the annual meeting of the Southwest Federation of Academic Disciplines as a service to SWFAD members. In March 1991, Tim Singleton, past president of NACRA challenged case researchers to do something "different" to reenergize the NACRA involvement at SWFAD. The challenge was answered by a few dedicated people who formed SWCRA during the subsequent year. Supported by NACRA, the association held its first formal meeting in San Antonio in March, 1992 when it published its first volume of proceedings.

The first president at that meeting was Robert McClashan of the University of Houston, Clear Lake. Carl Ruthstrom served as program chair and as the first editor of the Association's journal, the *Journal of Applied Case Research*. While the initial participants numbered 79, 84 charter members were identified with numbers 01-84.

The first full slate of officers was elected at the 1992 meeting: Carl Ruthstrom, President; Walt Green, 1993 Program Chair; Secretary and Historian Michael Menefee; and Robert Carter, Treasurer. The Association wrote and enacted a Constitution and By-Laws. These were updated significantly at the 2003 Meeting in Houston and have been amended periodically.

History of The Journal of Applied Case Research

The Journal of Applied Case Research was formed by SWCRA to publish cases and papers dealing with issues in all business-related disciplines that involve case writing, research, and teaching. At the time the Journal originally started, there were few publication outlets for cases. However, now there are several case journals, and many article-oriented journals will carry cases on a regular basis.
The Journal focuses on real world cases based on field research or research from secondary sources. Fictitious cases are not considered for publication. An instructor's manual must accompany each case to facilitate classroom use.

Dan Jennings of Texas A&M University succeeded Carl Ruthstrom as Proceedings and Journal Editor in 1997 and held those positions until 2000 when Leslie Toombs, University of Texas -- Tyler, became Editor. Alex Sharland of Barry University was appointed Editor in March 2002. Steve Maranville became Editor in 2007 and served for just over two years. The Journal was edited by Alex Sharland for one year (2009-2010) on an interim basis. At the 2010 meeting, Joe Kavanaugh was appointed to fill a three-year term as Vice President, Publications and Journal editor. At the 2014 meeting, Irfan Ahmed was appointed to a three year term as Vice President, Publications and Journal editor

During Steve Maranville's tenure the Journal of Applied Case Research became a fully digital and online outlet for case research. The online parts of the organization are coordinated by Gerald Kohers at Sam Houston State University.

The editor is actively seeking new cases for acceptance into the next edition. Please consider the Journal for your manuscripts and spread the word. We are open for business and welcome your work.

Journal of Applied Case Research
Editor – Irfan Ahmed, Sam Houston State University
irfanahmed@shsu.edu
936-294-1276

SWCRA Past Presidents

1992-1993	Carl Ruthstrom
1993-1994	Walt Green
1994-1995	Michael Menefee
1995-1996	Doug Grider
1996-1997	Daniel Jennings
1997-1998	Stanley Phillips
1998-1999	Leslie Toombs
1999-2000	Patricia Feltes
2000-2001	Marlene Reed
2001-2002	Wilke English
2002-2003	Carol Cumber
2003-2004	Kay Guess
2004-2005	Steve Maranville
2005-2006	Hank Maddux
2006-2007	Carol Cumber
2007-2008	Joe Kavanaugh
2008-2009	Alex Sharland
2009-2010	Steve Vitucci
2010-2011	Don Mosley, Jr.
2011-2012	Rodney Vandeveer
2012-2013	Jeffrey Miller
2013-2014	Irfan Ahmed
2014-2015	Simon Medcalfe
2015-2016	Robert Stevens
2015-2017	Timothy D. Wise

Southwest Case Research Association Officers, 2016-17

President	**Lawrence Silver**, Southeastern Oklahoma State University
President Elect	**Timothy Wise**, Southern Arkansas University
Vice President, Programs	**Courtney Kernek,** Southeastern Oklahoma State University
Secretary	**Wilke D. English**, Texas A&M University – Central Texas
Treasurer	**Julia Kwok**, Northeastern Oklahoma State University
Vice Presidents, Technology	**Gerald Kohers**, Sam Houston State University
Vice President, Publications (Proceedings Editor)	**Irfan Ahmed**, Sam Houston State University
Historian and Archivist	**Daniel F. Jennings**, Texas A&M University – College Station
Immediate Past President	**Robert Stevens**, Southeastern Oklahoma State University

2017 Conference Track Chairs

Accounting/Finance/Economics	**Julia Kwok**, Northeastern Oklahoma State University
Human Resource Management/ Organizational Behavior	**Tim Wise**, Southern Arkansas University
Healthcare Marketing	**Vivek Natarajan**, Lamar University
International Business	**Syed Tariq Anwar,** West Texas A&M University
Non-Profit Management/Ethics	**Robert Howard,** Southeastern Oklahoma State University
Marketing	**Robert Stevens,** Southeastern Oklahoma State University
Small Business/Entrepreneurship	**Tim Wise**, Southern Arkansas University
Strategic Management/ Business Policy	**Robert Stevens,** Southeastern Oklahoma State University
Symposium Track	**Martin Bressler,** Southeastern Oklahoma State University
Student Track	**Lawrence Silver**, Southeastern Oklahoma State University

2017 Conference Program

March 8, 2017 (Wednesday)

1:30 p.m. – 2:30 p.m.	Pinnacle (M)

FBD/SWCRA *Choice Pick* Session

SESSION A **Special Guest Speaker**

Rashid Sesay
Director of Programs for Africa and Asia
Heifer International Farming Entrepreneurship

2:30 p.m. – 3:00 p.m.	Pinnacle (M)

SWCRA Coffee Break

3:00 p.m. – 4:00 p.m.	Pinnacle (M)

SESSION B **Special Guest Speaker**
Arkansas Economic Development Corporation

4:00 p.m. – 5:00 p.m.	Pinnacle (M)

SESSION C **Case Writing Symposium:**

Publication, Impact and Credit – The 2nd Half of the Case Research Process

Presenter: **John Lawrence**
Editor, *Case Research Journal*
A.D. Davis Professor of Business, University of Idaho

Short Abstract: You've written a great case, classroom tested it, and brought it to a case writers' conference for fine tuning. That's super – but you are only half way there. Work remains to get your case published, drive adoptions of your case so that all of your hard work translates into impact for students, and finally get credit for that impact for both yourself and your institution. This presentation will focus on how to successfully navigate this 2nd half of the case research process. The first part of the presentation will provide you with guidance and strategies on how to approach the publication process, from selecting a journal to dealing with the difficult reviewer who just doesn't seem as excited about your case as everybody else. Then we will look at what you as an author can do to increase the likelihood that your case will be adopted and used in the classroom. The final portion of the presentation will provide you ammunition for selling the value of your published case when you go up for annual review and promotion as well as when your college goes up for AACSB accreditation.

March 9, 2017 (Thursday)

7:00 a.m. – 7:30 a.m.	Pinnacle (M)

Past President's Meeting

7:30 a.m. – 9:00 a.m.	Pinnacle (M)

SOUTHWEST CASE RESEARCH ASSOCIATION BREAKFAST AND BUSINESS MEETING

All SWCRA Members invited. Business meeting starts at 7:30 a.m.

9:00 a.m. – 12:00 p.m.	Pinnacle (M)

SESSION D Accounting and Finance Track

Session Chair: **Julia Kwok**, Northeastern State University

Income Inequality: Is it the Major Socioeconomic Issue Today? A Critical Incident
Dr. Mary H. Kelly, Texas A&M University – Central Texas

A Case on Mortgage Loans and Refinancing
Halil D. Kaya and **Julia S. Kwok**, Northeastern State University

Glory Corporation
Dr. Russell (Rusty) Calk, Texas A&M University – Central Texas
Dr. Pamela S. Carr, Arkansas Tech University
Shelly Garcia, MJ Associates

Why the Delinquent Payments? Follow the Checks
Cynthia Jolly and **Thomas D. Tolleson**, Texas Wesleyan University

Collin Street Bakery, Fruitcakes and Profits? A Tale from the Darkside
Christine Scot and Thomas D. Tolleson, Texas Wesleyan University

9:00 a.m. – 12:00 p.m. Pinnacle (M)

SESSION E Student Track

Session Chair: **Lawrence Silver**, Southeastern Oklahoma State University

Special orders: what if the customer doesn't return?
Miranda Mayo, Southeastern Oklahoma State University
Courtney Kernek, Southeastern Oklahoma State University (faculty mentor)

The Case for Profitable Sustainability: The Case of Unilever
Nadia Jenkins, University of South Alabama
Alex Sharland, University of South Alabama (faculty mentor)

SESSION F Non-Profit Management/Ethics Track

Session Chair: **Robert Howard,** Southeastern Oklahoma State University

Joe Smith's Ethical Dilemma: Humble Energy, Inc.
Robert Howard, Southeastern Oklahoma State University
Stephanie Metts, Southeastern Oklahoma State University
Janie Joplin, Southeastern Oklahoma State University

To Blow the Whistle or Not? An Employee Suspects His Manager is Stealing
(A Critical Incident)

Wilke D. English, Texas A&M University – Central Texas
Walt Butler, Texas A&M University – Central Texas

9:00 a.m. – 12:00 p.m.	Pinnacle (M)

SESSION G Marketing/Strategic Management Track

Session Chair: **Robert E. Stevens**, Southeastern Oklahoma State University

Privatization Gone Sour! PIA's Global Strategy in the Airline Industry
Syed Tariq Anwar, West Texas A & M University

Marketing The Online MBA: A Strategic Growth Strategy
Robert E. Stevens, Southeastern Oklahoma State University
Martin S. Bressler, Southeastern Oklahoma State University
Lawrence S. Silver, Southeastern Oklahoma State University

Valerosa Designs and Gallery
Leslie A. Toombs, Texas A&M University – Commerce
Courtney Kernek, Southeastern Oklahoma State University

Debbie Silver Presents
Lawrence S. Silver, Southeastern Oklahoma State University
Robert E. Stevens, Southeastern Oklahoma State University

SESSION H Small Business and Entrepreneurship

Session Chair: **Timothy D. Wise**, Southern Arkansas University

Sew Amazing Studios, Inc.
Helen Sikes, Centenary College
Barbara Davis, Centenary College
Kyle Ristig, Centenary College

Unique Display Cases, Inc.
Robert Stevens, Southeastern Oklahoma State University
David Loudon, Samford University
Lawrence Silver, Southeastern Oklahoma State University
Martin Bressler, Southeastern Oklahoma State University
Stephanie Metts, Southeastern Oklahoma State University

Marcher Lord Press: Of Faith and Vampires
Timothy D. Wise, Southern Arkansas University

1:30 p.m. – 3:00 p.m.	Peck (M)

SESSION L 2018 Program Planning Meeting
Session Chair: **Tim Wise**, Southern Arkansas University

Case Synopses

Joe Smith's Ethical Dilemma: Oklahoma Energy Inc. (Critical Incident)

Robert Howard, Southeastern Oklahoma State University
Stephanie Metts, Southeastern Oklahoma State University
Janie Joplin, Southeastern Oklahoma State University

Case Synopsis

This critical incident exemplifies some of the ethical dilemmas faced in professional accounting organizations. In this case, Joe Smith, an accountant for the Oklahoma Energy, Inc. was the liaison between the accountants in his groups and the IT department for the organization. This case details the actions Mr. Smith takes when he discovers he has access to a sensitive data file and the ramifications of those actions to Mr. Smith, his superiors and fellow coworkers.

This case is a description-based case and primary data was used to develop the case. An employee in the organization was the source of information. This case details actual situations with the actual names of the individuals involved and the organization disguised.

Courses and Levels for Which Case is Intended

This case is suitable for an undergraduate or graduate business ethics courses. It can be used to provide students with the opportunity to utilize ethical theories to understand which ethical theory or theories are appropriate to help the students in determining the ethical issues involved.

Teaching Objectives

There are several objectives that may be achieved with the case. The case should enable students to:

1. Distinguish between different approaches to ethical decision making by using the basic ethical theories to rationalize the issues.
2. Examine a real ethical issue faced by a professional with broad implications affecting other people and organizations.

Theory Application

Students are provided with an opportunity to analyze decisions that were made and provide an ethical alternative. They are challenged to analyze what Joe's and Oklahoma Energy's responsibilities were and to whom and how the situation should have been handled. The case requires that students evaluate the various options available to the Joe and Oklahoma Energy and use their understanding of ethical principles to determine the correct course of action.

Research Methods

Data Sources

Primary data was used to develop the case. An individual working in the firm supplied primary information.

Extent of Disguise

This case details actual situations with the actual names of individuals and the organization disguised.

Suggested Teaching Approaches

This case details actual situations that can be used to provide undergraduate and graduate students with an opportunity to make practical application of ethical theories to an issue faced by a professional with broad implications affecting other people and organizations and to examine the economic impact of the ethical decision. This case is suitable for written reports, oral presentations, and examination purposes.

Contact person: Robert Howard, Southeastern Oklahoma State University. Phone: 580-745-2042, Fax 580.745.7479, E-mail: rhoward@se.edu

To Blow the Whistle or Not?
An Employee Suspects His Manager is Stealing
(A Critical Incident)

Wilke D. English
Texas A&M University – Central Texas - Retired

Walt Butler
Graduate Research Associate
Texas A&M University – Central Texas

Case Objectives and Use

The objective of this case is to explore the perilous dilemma that employees face when reporting their supervisor. The case also explores ways in which the employee can best approach such a situation.

This is a decision-based case. It is appropriate for use in upper-division undergrad, graduate, or executive education courses in business ethics or corporate governance.

Case Synopsis

Jason was the store manager at one Auto Parts Unlimited location. After a few weeks, Jason approached an assistant manager, Bob, to write-off a number of merchandise items from inventory as either damaged or defective, although no damage was discernible. Over time, many of the items became more expensive. Bob had also noticed that Jason had approached other parts managers as well for write-offs.

Should Bob report Jason? If he does not, could Bob be considered an accomplice or accessory to the crimes?

But, if he reports Jason, and Jason is able to refute the charges, Bob will surely be fired by Jason.

Contact Person: Wilke English, PO Box 1708, Belton, TX 76513, (254) 541-6348.
wdenglish1@hotmail.com

Privatization Gone Sour!
PIA's Global Strategy in the Airline Industry

Syed Tariq Anwar, West Texas A&M University

Case Objectives and Use

In 2015-2016, the government of Pakistan planned to privatize Pakistan International Airlines (hereafter PIA) but was unable to do that because of the airline's labor unions, employees, and political parties. Basically the government's privatization initiative went sour and continues to be a drag on the economy. PIA is the flagship airline and national carrier of Pakistan. The airline was founded in 1955 and witnessed a massive growth and expansion in the seventies and eighties. In its early days, the airline carried a rich history and brand identity in the global airline industry. However in the last ten years, PIA had been losing money and market share because of the arrival of Gulf carriers (Emirates, Qatar Airways and Etihad Airlines), mismanagement, and cost-related inefficiencies. The case is appropriate for use in graduate and senior undergraduate international business strategy and strategic management courses.

Case Synopsis

PIA was founded by the Pakistani government to start a national carrier because of consumer demand in domestic and global markets. In the sixties and the seventies, the airline grew by leaps and bounds and witnessed significant growth and expansion. This was also possible in the absence of well-organized competitors in South Asia and the Middle East. From its heydays, PIA became Pakistan's national brand because of its first-mover advantage regarding acquiring commercial jets and finding profitable routes and government subsidies. In its early days, PIA maintained profitable routes which included Cairo, Rome, London, Tokyo, Shanghai, and other well-known destinations. Since 2005, market conditions have changed because of the arrival of Gulf carriers and cost inefficiencies. In the last ten years, PIA continues to lose money and has become a national embarrassment. By being a state-owned enterprise (SOE), the airline is majority owned by the government of Pakistan and has limited options for maneuverability. In 2016, PIA's market share was down and the carrier had only 43 planes versus Emirates' fleet of 232 planes. Interestingly Emirates leased a plane from PIA in the eighties to start its operations. Like other SOEs and because of weakened revenues and losses, PIA is no longer a competitive airline in the global airline industry. In 2015-2016, the Pakistani government tried to privatize PIA but ended up changing its plans because of the airline's labor unions and Pakistani political parties. Industry analysts believe that PIA can only survive if it accepts a private investor or other airline buying 49 percent of its ownership. Within these circumstances and corporate developments, the case is intended to have students look at PIA's privatization, global strategy, and survival in the fast changing airline industry.

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Marketing The Online MBA: A Strategic Growth Strategy

Robert Stevens, Southeastern Oklahoma State University
Martin Bressler, Southeastern Oklahoma State University
Lawrence Silver, Southeastern Oklahoma State University

Case Objectives and Use

The primary focus of this case is to examine the decision process a university is considering when facing a severe financial situation. Various aspects of using an outside marketing agent is the basis of analysis including the impact on revenues, faculty, and AACSB accreditation issues if the marketing agent can expand the MBA as quickly as they contend and as quickly as their track record with other universities implies.

Students are also asked to analyze these aspects of the potential arrangement from data provided by secondary research and projections of the impact on the university's MBA enrollment. The case is appropriate for an advanced undergraduate course or graduate course in strategy.

Case Synopsis

Tim Boatman is reviewing information for the president from the marketing agent as well as some internal analysis provided by business faculty. The marketing agent would alter how MBAs are recruited, vetted for admission, and enrolled thus affecting the registration process, internal review of applicants and class size and composition. When the MBA program was restructured and taught 100% online, enrollment from had increased from 40 to over 80 MBA students. This meant that class sizes went from 14-20 students per class to 20-30 per class. However, the impact anticipated by the marketing agent would mean class sizes of 100-150 per course.

First, Boatman conducted secondary research to analyze location, size, tuition, and hours required in several other MBA programs to establish the competitive position the university's MBA program occupied as well as their AACSB affiliation to determine how competitive the university was in hours required and tuition. Then some business faculty were asked to develop scenarios of the impact on revenues coming into the university with various levels of growth in the MBA program over the next few years.

The business faculty was also asked to determine the impact of the increase in enrollment on the very "thin" faculty resources and AACSB accreditation with some courses needing to be taught by adjuncts until enrollment levels justified hiring new faculty. It was obvious from the analysis that some of the revenues generated by the increase in enrollment had to be used for hiring new faculty.

Contact person: Robert Stevens, Southeastern Oklahoma State University, John Massey School of Business, 425 University Ave., Durant, OK 74701. Phone 580.745.3181; E-mail: rstevens@se.edu

Valerosa Designs and Gallery

Leslie Toombs Texas A&M University - Commerce
Courtney Kernek Southeastern Oklahoma State University

Case Objectives and Use

The primary focus of this critical incident is to examine the selection of distribution channels for a struggling art and design gallery that sells artisan jewelry and consigned art pieces. The owner is brainstorming strategies to keep the gallery in business and is struggling with the identification, selection, and implementation of the most effective channel(s) to grow her gallery.

Students are asked to describe a multichannel distribution system and discuss the advantages and disadvantages of implementing this channel approach. In addition, they are required to propose online marketing strategies designed to reach potential customers for the gallery, which has limited business resources. The case is appropriate for an advanced undergraduate or graduate course in marketing, including marketing channels, and entrepreneurship.

Case Synopsis

Neita Fran Ward is the owner of an art and design gallery located in Tyler, Texas. She has previous experience in this type of business and knew she needed more resources than she had available to make this gallery successful. She invited two other entrepreneurs to pool their resources in a joint venture type of arrangement where each person brought resources to sell to the business, shared in the overhead costs of the gallery, and provided labor to cover the operational needs. At the end of the first year of operation of the gallery the two entrepreneurs were no longer participating in the venture and Neita Fran finds herself facing a difficult decision: without the monetary contribution of the two others to gallery overhead, she is struggling to cover the costs of the gallery and is considering shutting it down. She does not want to close the gallery but it is critical that she grow the customer base and sales (revenue).

The critical incident briefly describes Neita Fran Ward and Valerosa's background and current situation. Neita Fran must decide whether to implement a multichannel distribution strategy and expand her business through the development of a new market for her artisan jewelry line that is currently Valerosa's primary source of revenue. She must also evaluate her current marketing strategies and the role of online marketing. The data presented in the case allows students to evaluate multichannel distribution strategies, online marketing strategies, and integration of channels. Students will also need to address how Neita Fran, with limited experience in ecommerce, online marketing, social media, and budget for marketing, can more effectively reach her current and potential target markets.

<u>Contact person</u>: Leslie Toombs, Texas A&M University - Commerce, College of Business, P.O. Box 31, Commerce, TX 75429. Phone 903-886-5695; E-mail: leslie.toombs@tamuc.edu

Sew Amazing Studios, Inc.

Helen Sikes, Centenary College
Barbara Davis, Centenary College
Kyle Ristig, Centenary College

Case Objectives and Use

Sew Amazing Studios, Inc. is a decision-based case using primary data. Names, locations and other information has been altered to conceal the true identity and location of the business. This case is suitable for Juniors and Seniors in Business Management, specifically a Human Resource Management class.

Case Synopsis

This case involves a small business required to replace multiple employees over a short period of time and manage the associated pressures on the business. In the case, students are presented with several job openings and a number of applicant profiles. The students then must match job requirements with applicant skill sets, rank the hiring in terms of job importance and present a hiring timeline to best maximize on-the-job training. Students must critically evaluate applicant attributes and provide justification for their selection.

Contact person: Helen Sikes, Centenary College. Phone: 318-869-5182, Email: hsikes@centenary.edu

Unique Display Cases, Inc.

Robert Stevens, Southeastern Oklahoma State University
David Loudon, Samford University
Lawrence Silver, Southeastern Oklahoma State University
Martin Bressler, Southeastern Oklahoma State University
Stephanie Metts, Southeastern Oklahoma State University

Case Objectives

1. To help students understand the differences in needs of various market segments based on the characteristics of the segments
2. To help students learn the problems involved in going after larger, more geographically dispersed markets
3. To show how new market segments require new marketing mix elements to develop effective strategies
4. To help students learn the value of forecasting sales, costs, and profits as part of the analysis in product introductions to new segments

Case Synopsis

This case presents a situation in which a company has launched a new product, a wooden display case shaped like an 18 wheeler for small model cars, and has had only limited success due to a lack of promotion and a rather small target market. The wooden model is a problem for the children's market due to the production cost. The company is considering whether to introduce a plastic version to target children who are more likely to use the product as a toy rather than a case to display rare and expensive model cars.

An additional challenge for the company is the limited resources available to launch a full-scale marketing campaign to reach parents/children and retailers. One option is to consider licensing another company to produce and market the product.

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Permission to Use SWCRA Cases

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