

Harvard Business School Publishing Case Map for
Wheelen/Hunger: STRATEGIC MANAGEMENT AND BUSINESS POLICY, 8/e
 (Prentice-Hall, 2002)

Note: Every case map provides only a partial list of relevant cases from HBS Publishing. To explore alternatives, or to get more information on the cases listed below, visit our web site at www.hbsp.harvard.edu and use the searching functions.

| <i>Case Title, authors</i> | <i>Institution, Length, HBSP Product Number, Supplements, Teaching Note (TN) availability</i> | <i>Geographical and Industry Setting, Company Size, Time Frame</i> | <i>Abstract</i> |
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| Chapter 1: Introduction to Strategic Management and Business Policy | | | |
| The Walt Disney Co.: The Entertainment King Michael G. Rukstad ; David J. Collis ; Tyrrell Levine | HBS 27p Product Number: 9-701-035 Suppl. Available TN available | United States Industry Setting: entertainment Gross Revenue: \$25.4 billion revenues Number of Employees: 110,000 Case Time Frame Start: 1923 Case Time Frame End: 2000 | The first ten pages of this case are comprised of the company's history, from 1923 to 2001. The Walt years are described, as is the company's decline after his death and its resurgence under Michael Eisner. The last five pages are devoted to Eisner's strategic challenges in 2001: managing synergy, managing the brand, and managing creativity. Students are asked to think about the keys to Disney's mid-1980s turnaround, about the proper boundaries of the firm, and about what Disney's strategy should be beyond 2001. |
| Anheuser-Busch and the U.S. Brewing Industry Anita McGahan | HBS 23p Product Number: 9-799-026 Supplement available TN available | United States Industry Setting: brewing Gross Revenue: \$11 billion revenues Number of Employees: 20,000 Case Time Frame Start: 1991 Case Time Frame End: 1991 | Presents an analytical report on the company's competitive position and on the industry structure in 1991. Used to show how a company can generate value through steady, incremental investment over a long period in a business model tailored to the industry context. Also illustrates the challenges of market leadership. Teaching Purpose: Shows how enormous value may be created in a business that grows systematically rather than through risky investment in a few large-scale projects. |
| Levi's "Personal Pair" Jeans (A) William Lawler ; John K. Shank ; Lawrence Carr | Babson 6p Product Number: BAB020 B case available TN available | United States Industry Setting: clothing Case Time Frame Start: 1998 Case Time Frame End: 1998 | As Levi-Strauss implemented its custom-fitted jeans offering, the traditional value chain for clothing manufacturing and retailing was transformed. This case allows students to explore the subtleties of this transformation and the management implications. Teaching Purpose: To introduce students to value-chain analysis within the context of management accounting. |
| Wal-Mart Stores' Discount | HBS Product | United States Industry Setting: | Facilitates a discussion of the sources of Wal-Mart Stores' competitive advantage in discount |

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| Operations Pankaj Ghemawat | Number: 387-018 12p Supplement available TN available | discount retailing, 1976-1985 | retailing, and the future sustainability of that advantage. Also profiles the company's major diversification move in the early 1980s. |
| Chapter 2: Corporate Governance and Social Responsibility | | | |
| Fogdog John W. Glynn Jr. ; Christopher S. Flanagan | Stanford 21p Product Number: E100 TN available | California Industry Setting: Internet sporting goods retailing Gross Revenue: \$25 million revenues Number of Employees: 150 Case Time Frame Start: 1994 Case Time Frame End: 2000 | Examines the growth and development of Fogdog, an online sporting goods retailer, from its founding to its sale to Global Sports--one of its publicly traded competitors. Built to capitalize on the Internet, Fogdog faced issues specific to the economic climate at the time, but also faced timeless issues that many emerging companies experience, such as board composition and development, communication between a company and its board, and the respective positions and responsibilities of both management and a company's investors when tough company decisions have to be made. Ends with the "forced" sale of Fogdog by the company's board at a time when the near-term outlook for Internet-related companies was uncertain. Teaching Purpose: Focuses on the relationship between a company and its board of directors through different stages of the corporate life cycle. Students consider many issues, including: Who is in control of the company at any given time? Who is represented on the company's board of directors ? What is the best way for communication to take place between and among the board and senior management members? What other outside responsibilities do directors and other senior management team members have? |
| Digitas Jay W. Lorsch ; Katharina Pick | HBS 12p Product Number: 9-401-022 | Boston, MA Industry Setting: technology & marketing services Gross Revenue: \$187 million revenues Number of Employees: 1,600 Case Time Frame Start: 1999 Case Time Frame End: 1999 | The CEO of Digitas, a Boston-based technology and marketing services company, thinks about how a recent decision to go public will affect the company's board of directors . Three of the company's directors represent the private equity firm Hollman & Friedman, which has a controlling stake in Digitas and will continue to hold a large stake after the IPO. Teaching Purpose: To discuss the dynamics of a private equity board and explore how an IPO would affect such a board. |
| GE's Two-Decade Transformation: Jack Welch's Leadership Christopher A. Bartlett ; Meg Wozny | HBS 24p Product Number: 9-399-150 Video available TN available | United States, Global Industry Setting: industrial conglomerate Gross Revenue: \$100 billion revenues Number of Employees: 293,000 Case Time Frame | GE is faced with CEO Jack Welch's impending retirement and the question on many minds is whether anyone can sustain the blistering pace of change and growth characteristic of the Welch era. After briefly describing GE's heritage and Welch's transformation of the company's business portfolio of the 1980s, the case chronicles Welch's revitalization initiatives through the late 1980s and 1990s. It focuses on six of Welch's major change programs: The "Software" Initiatives, Globalization, Redefining |

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| | | Start: 1981 Case Time Frame End: 1998 | Leadership, Stretch Objectives, Service Business Development, and Six Sigma Quality. Teaching Purpose: Can be used to develop multiple lessons, including corporate strategy development, transformational change, management and leadership, and corporate renewal. |
| Al Dunlap at Sunbeam Brian Hall ; Rakesh Khurana Carleen Madigan | HBS 21p Product Number: 9-899-218 TN available. | United States Industry Setting: household appliances Gross Revenue: \$109,415,000 revenues Number of Employees: 7,500 Case Time Frame Start: 1996 Case Time Frame End: 1998 | Al Dunlap was one of the best-known corporate turnaround artists of the 1990s. In 1996, he was hired at Sunbeam to effect a restructuring, but was fired almost two years later when the company's financial performance and stock price began to decline. Many of the controversies that had surrounded him at his previous job, Scott Paper, also followed him to Sunbeam: his rejection of the multiple stakeholder view of corporate governance, his aggressive managerial style, his shaky relations with the media, and his high level of pay. The case describes Dunlap's compensation package at Sunbeam and addresses the issue of how U.S. companies compensate "superstar" CEO's . Teaching Purpose: To discuss the debate about multiple stakeholders versus shareholder primacy; to analyze the incentives and compensation packages of highly sought-after CEOs, the amount and form of their pay packages (cash, bonus, options, etc.), and stock price as a measure of performance. |
| Finast Supermarkets (A) Kirk O. Hanson ; Jonathan Eisenberg | Business Enterprise Trust 5p Product Number: 9-993-005 B case available. TN available. | Cleveland, OH Industry Setting: supermarket | Describes the launch of a series of superstores in inner-city Cleveland. Presents issues of urban and inner-city development. Establishes the problem of operating in the inner city, which has caused many retailers, including grocery chains, to shut down and move to the suburbs. Teaching Purpose: May be used in Ethics, Urban Development, and Retailing courses to help students explore: 1) the responsibility of businesses, especially retailers, to urban economic development; 2) problems facing inner-city consumers; 3) techniques for managing costs in urban environments; and 4) the prospects for superstores in the city. |
| Chapter 3: Environmental Scanning and Industry Analysis | | | |
| Napster and MP3: Redefining the Music Industry Mary M. Crossan Margaret Ann Wilkinson ; Mark Perry ; Trevor Hunter ; Tammy Smith | Ivey School, UWO 22p Product Number: 901M02 TN available. | Global Industry Setting: music Case Time Frame Start: 2000 Case Time Frame End: 2000 | The music industry has changed dramatically as technological and business innovations have transformed how music is acquired and how value is created and distributed. Napster, Inc. operated one of several Web sites that allowed Internet users free access to MP3 music files--which eventually led to lawsuits aimed at protecting intellectual capital. The case explores the issues, then examines the forces at play in the transformation of the music industry, the strategic alternatives for players in the industry, and the legal context underpinning the strategic alternatives, with a particular focus on the protection of intellectual capital. |
| The U.S. Airline | HBSP | United States, | Describes the economic logic leading to the |

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| <p>Industry in 1995 Anita McGahan ; Julia Kou</p> | <p>Product Number: 795-113 22p TN available</p> | <p>airline, 1995</p> | <p>deregulation of the American airline industry in 1978, and subsequent competitive developments. The roles of computerized reservation systems, airport hubs, route strategies, and fleet management are raised as unanticipated tactical responses. The decision focus of the case emphasizes the prospect of regulation. This case is designed to illustrate the connections between industry evolution and the opportunities available to firms as they seek to develop competitive advantage.</p> |
| <p>Computer Reservation Systems : An Industry of Its Own Ali E. Farhoomand ; Andrew Lee</p> | <p>Univ. of Hong Kong 17p Product Number: HKU055 TN available</p> | <p>Global Industry Setting: airline industry Case Time Frame Start: 1998 Case Time Frame End: 1998</p> | <p>Computer Reservation Systems (CRS) vendors have enjoyed an indispensable role in the travel industry-- 75 to 80% of all airline bookings are made by travel agents using CRSs. But by mid-1998, their solid position in the industry is being threatened by two forces: the websites run by airlines that are capable of accepting bookings directly from customers, and a new CRS, supported by travel agencies around the world, called Genesis. It is scheduled to go on trial in 4th quarter of 1998 and for launch in 1999. Teaching Purpose: The objective of this case is for the students to recognize these two threats, analyze the nature of them, and devise a number of strategies to counter them.</p> |
| <p>The Chinese Fireworks Industry Paul W. Beamish Ruihua Jiang</p> | <p>Ivey School, UWO 15p Product Number: 99M031 TN available</p> | <p>China Industry Setting: fireworks Case Time Frame Start: 1999 Case Time Frame End: 1999</p> | <p>Illustrates an industry that is experiencing intensifying competition and regulation. The Chinese fireworks industry thrived after China adopted the "open door policy" in the late 1970s and grew to make up 90% of the world's fireworks export sales. However, starting from the mid-1990s, safety concerns led governments both in China and abroad to set up stricter regulations. At the same time, there was rapid growth in the number of small family-run fireworks workshops, whose relentless price cutting drove down profit margins. Teaching Purpose: Students are asked to undertake an industry analysis, estimate the industry attractiveness, and propose possible ways to improve the industry attractiveness from an individual investor's point of view.</p> |
| <p>Edward Jones Michael E. Porter Gregory C. Bond</p> | <p>HBS 23p Product Number: 9-700-009</p> | <p>United States Industry Setting: retail financial services Gross Revenue: \$1 billion revenues Number of Employees: 11,000 Case Time Frame Start: 1999 Case Time Frame End: 1999</p> | <p>Edward Jones is a leading, highly profitable retail brokerage firm with a unique strategy vis-a-vis its rivals. The case describes Jones's activities and allows a rich discussion of its positioning choices, supporting activities, and tradeoffs. Jones must cope with a rapidly evolving industry, which at least on the surface, is threatening to its strategy. Teaching Purpose: Reviews strategic positioning and strategy in changing industries.</p> |
| <p>Gillette Indonesia John A. Quelch ; Diane Long</p> | <p>HBS 15p Product Number:</p> | <p>Indonesia Industry Setting: consumer products Gross Revenue: \$6.8</p> | <p>The country manager of Gillette Indonesia is reviewing his 1996 marketing plan and considering whether the pace of market development and mix of product sales can be impacted by the level and type</p> |

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| | 9-597-009 TN available | billion revenues Number of Employees: 33,500 Case Time Frame Start: 1995 Case Time Frame End: 1996 | of Gillette expenditures in the market. Teaching Purpose: To illustrate the evolution of a product line in an emerging market and to understand how management can influence the pace of market development. |
| Chapter 4: Internal Scanning: Organizational Analysis | | | |
| Starbucks Mary M. Crossan Ariff Kachra | Ivey School, UWO 27p Product Number: 98M006 TN available | United States Industry Setting: retail coffee shops Company Size: large Case Time Frame Start: 1997 Case Time Frame End: 1997 | Starbucks is faced with the issue of how it should leverage its core competencies against various opportunities for growth, including introducing its coffee in McDonalds, pursuing further expansion of its retail operations, and leveraging the brand into other product areas. The case is written so that students need to first identify where Starbucks' competencies lie along the value chain , and then assess how well those competencies can be leveraged across the various alternatives. Also provides an opportunity for students to assess what is driving growth in this company. Starbucks has a tremendous appetite for cash since all its stores are corporate, and investors are betting that it will be able to continue its phenomenal growth so it needs to walk a fine line between leveraging its brand to achieve growth and not eroding it in the process. |
| Xerox: Book-In-Time V. Kasturi Rangan | HBS 18p Product Number: 9-599-119 TN available | United States Industry Setting: book publishing Company Size: Fortune 500 Gross Revenue: \$20 billion revenues Case Time Frame Start: 1999 Case Time Frame End: 1999 | Describes the state of the book publishing industry and the potential for a new technology. Book-In-Time, developed at Xerox, can reduce the cost of printing "one" book dramatically. Combined with the possibilities of digital content storage and transmittal, the new technology has vast opportunities. Xerox needs a commercial plan. Teaching Purpose: To discuss the impact of technology on distribution value chain . |
| Bedrock Productions Michael J. Roberts ; Michael L. Tushman | HBS 21p Product Number: 9-401-045 | New York Industry Setting: Web consulting Company Size: small Gross Revenue: \$10 million Number of Employees: 100 Case Time Frame Start: 2000 Case Time Frame End: 2000 | Describes a young Web consulting firm going through a very rapid period of growth in late 1999 and 2000. The founder/CEO sees himself as more of a strategist marketer and less well-suited to the operational details, which are expanding as the firm grows. A president is hired, but fired soon after. Raises issues around what the founder's role is/should be, whether a new president is required, whether the new expanded senior team can take on some of these responsibilities, and if/how the founder must change |
| Southwest Airlines – 1993 (A) James L. Heskett Roger Hallowell | HBS Product Number: 694-023 29p Supplement | Dallas, TX Industry Setting: airlines, 1993 | Southwest Airlines, the only major U.S. airline to be profitable in 1992, makes a decision as to which of two new cities to open, or to add a new long-haul route. Provides windows into Southwest's strategy, operations, marketing, and culture. Illustrates how an airline can |

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| | available | | simultaneously be a low-cost leader, service leader, and profit leader. |
| Continuous Casting Investments at USX Corp. Clayton M. Christensen | HBS Product Number: 697-020 18p TN available | United States Industry Setting: steel, 1987-1989 | Focuses on the difficulty established companies face when confronted with disruptive technological innovations. The power that their prior asset investments, their cost structures, and their customers have in constraining their investment and innovation decisions are clearly illustrated. |
| Chapter 5: Strategy Formulation: Situation Analysis and Business Strategy | | | |
| Robert Mondavi: Competitive Strategy Michael E. Porter Gregory C. Bond | HBS 23p Product Number: 9-799-125 | Global Industry Setting: wine Gross Revenue: \$325 million revenues Number of Employees: 1,100 Case Time Frame Start: 1999 Case Time Frame End: 1999 | Describes the competitive situation facing Robert Mondavi, the leading premium California winery. Mondavi has been an industry innovator and has recently taken steps to become more international. Mondavi has to cope with growing domestic competition as well as market share growth by wineries from Chile and Australia. Teaching Purpose: Designed to explore competitive strategy in an evolving industry with a special focus on international strategy. |
| Eckerd Corp. Michael E. Porter John C. Kelleher | HBS 23p Product Number: 9-799-141 | United States Industry Setting: retail drugs Company Size: large Gross Revenue: \$10 billion revenues Number of Employees: 78,000 Case Time Frame Start: 1940 Case Time Frame End: 1999 | Describes the history and current situation in the retail pharmacy industry, including competition from new merchants and Internet drug stores. Eckerd, one of the top four drug chains, must decide how to position itself for the future. Teaching Purpose: To support a discussion on the evolution of competition and competitive dynamics among rivals. |
| Matching Dell Jan W. Rivkin ; Michael E. Porter | HBS 31p Product Number: 9-799-158 | Global Industry Setting: personal computers Company Size: Fortune 500 Gross Revenue: \$19 billion revenues Case Time Frame Start: 1998 Case Time Frame End: 1998 | After years of success with its vaunted "Direct Model" for computer manufacturing, marketing, and distribution, Dell Computer Corp. faces efforts by competitors to match its strategy. This case describes the evolution of the personal computer industry, Dell's strategy, and efforts by Compaq, IBM, Hewlett-Packard, and Gateway 2000 to capture the benefits of Dell's approach. Students are called on to formulate strategic plans of action for Dell and its various rivals. Teaching Purpose: Designed to be taught in any of several places in an MBA course on competitive strategy. Permits an especially detailed examination of imitation; illustrates how fit among activities and incompatibilities between competitive positions can pose particularly high barriers to imitation. Can also be employed to illustrate competitor analysis, the evolution of industry structure, and relative cost analysis. |
| Progressive Corp. Michael E. Porter | HBS 25p Product | United States Industry Setting: automobile | Progressive is a leader in providing non-standard (high risk) automobile insurance to drivers across America, with a long record of extraordinary |

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| Nicolaj Siggelkow | Number: 9-797-109 | insurance Gross Revenue: \$2 billion revenues Case Time Frame Start: 1993 Case Time Frame End: 1993 | profitability. Progressive is facing a challenge in its segment from Allstate, the industry leader, and must decide how to respond. Teaching Purpose: Designed to explore competitive positioning using the concepts of activities, activity systems, and tradeoffs between positions. |
| Coca-Cola vs. Pepsi-Cola and the Soft Drink Industry Michael E. Porter Rebecca Wayland | HBS 26p Product Number: 9-391-179 | Global Industry setting: Beverages Company Size: Fortune 500 | Describes the competition between Coca-Cola and Pepsi-Cola. Provides a summary of the history of the soft drink industry prior to World War II, and over the period 1950-1990 in greater detail. Major strategic competitive moves and countermoves are described. Also profiles industry developments, including the Pepsi Challenge, the reformulation of Coca-Cola, and the consolidation of the bottler network. Provides a teaching vehicle for analysis of competitors and strategic rivalry . An updated and revised version of an earlier case. |
| Edmunds.com (A) Stephen P. Bradley ; Christina Akers | HBS 23p Product Number: 9-701-025 | Santa Monica, CA Industry Setting: Internet automotive resource site Case Time Frame Start: 1997 Case Time Frame End: 2000 | Edmund's began in 1966 as a publisher of new and used vehicle guides and grew into one of the leading third-party automotive web sites of today. This case explores how Edmunds.com gained a competitive edge using strategic partnerships and alliances, as well as careful product positioning and strategy implementation. |
| iSteelAsia.com: A B2B Exchange Ali F. Farhoomand ; Deric Tan | U. of Hong Kong 19p Product Number: HKU114 TN available | Hong Kong Industry Setting: B2B electronic commerce, steel Case Time Frame Start: 2000 Case Time Frame End: 2000 | Forging strategic alliances was a common method employed by operators of steel portals to expand their repertoire of services and to enhance the e-commerce capabilities of their sites. Those that aspired to promote and cement their presence in other countries had gone further by signing agreements with indigenous companies to leverage on their knowledge of and familiarity with the local industry. Regardless of their country of origin, these steel portals had taken a similar strategy to attract more users to their sites. iSteelAsia has been employing the same strategy to offer a range of third-party services and to create affiliated portals in other countries. However, in an unprecedented move, it is taking a step further. Instead of finding a strategic partner to promote its presence in other countries, it is proposing to acquire an equity interest in a steel trader. |
| Chapter 6: Strategy Formulation: Corporate Strategy | | | |
| Apple Computer, 2002 David B. Yoffie ; Yusi Wang | HBS 22p Product Number: 9-702-469 TN available | Global Industry Setting: personal computers Company Size: Fortune 500 Gross Revenue: \$5.4 billion revenues | In 1980, Apple was the leader of the PC industry, but by 2002 it had suffered heavy losses at the hands of the Wintel camp. This case examines Apple's strategic moves as the PC industry evolves in the 21st century and poses the question: Can Steve Jobs make Apple "insanely great" again? Teaching Purpose: To teach industry analysis and problems in |

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| | | Case Time Frame Start: 1977 Case Time Frame End: 2002 | sustaining competitive advantage. |
| Intel Corp.-- 1997-2000 Ramon Casadesus-Masanell ; Michael G. Rukstad | HBS 11p Product Number: 9-702-420 | Silicon Valley, CA Industry Setting: semiconductors Company Size: Fortune 500 Gross Revenue: \$30 billion revenues Number of Employees: 70,000 Case Time Frame Start: 1997 Case Time Frame End: 2000 | Describes Intel's diversification strategy initiated in 1998 by CEO Craig Barrett. Initially, Barrett's strategy worked well, as market value reached \$510 billion in September 2000. However, just three months later, investor pessimism over a slowing economy and recent problems at Intel resulted in market valuation plummeting by more than 55%. Teaching Purpose: Asks students to analyze the reasons for the drop in market value. |
| GE's Two-Decade Transformation: Jack Welch's Leadership Christopher A. Bartlett ; Meg Wozny | HBS 24p Product Number: 9-399-150 | United States, Global Industry Setting: industrial conglomerate Gross Revenue: \$100 billion revenues Number of Employees: 293,000 Case Time Frame Start: 1981 Case Time Frame End: 1998 | GE is faced with Welch's impending retirement and the question on many minds is whether anyone can sustain the blistering pace of change and growth characteristic of the Welch era. After briefly describing GE's heritage and Welch's transformation of the company's business portfolio of the 1980s, the case chronicles Welch's revitalization initiatives through the late 1980s and 1990s. It focuses on six of Welch's major change programs: The "Software" Initiatives, Globalization, Redefining Leadership, Stretch Objectives, Service Business Development, and Six Sigma Quality. Teaching Purpose: Can be used to develop multiple lessons, including corporate strategy development , transformational change, management and leadership, and corporate renewal. |
| Dean Foods Ray A. Goldberg David E. Bell ; Kim Slack ; Ann Leamon | HBS 24p Product Number: 9-901-007 | Franklin Park, IL Industry Setting: dairy processing Gross Revenue: \$4.4 billion revenues Case Time Frame Start: 2000 Case Time Frame End: 2000 | After 50 years of successful growth, mostly by acquisition, Dean Foods, the nation's second-largest dairy processor, has established a division to develop and market branded products nationally. Can a \$4 billion company rely on a \$300 million growth vehicle? Is this the best way to respond to the prevailing trends in the food retailing industry? Can Dean, known as a private label producer of fluid milk, make the transition from commodity to branded, value-added products? Teaching Purpose: To introduce students to the complexity of changing a corporate mindset from commodity production. |
| Tricon Restaurants International: Globalization Re-examined Pankaj Ghemawat ; Tarun Khanna | HBS 24p Product Number: 9-700-030 | Global Industry Setting: fast-food Number of Employees: 500,000 Case Time Frame Start: 1997 Case Time Frame End: 1997 | Describes a leading fast food operator/franchiser trying to consolidate and standardize its operations worldwide and focus its efforts on a few key markets. Lends itself to a discussion of how global the fast food industry is, whether Tricon's new international strategy is consistent with industry structure and its competitive position, and, if so, which country markets to focus on. |
| Dell: Selling Directly, | U. of Hong Kong | China Industry Setting: personal | One of the first companies to practice the highly-touted business-to-consumer Internet business |

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| <p>Globally Ali E. Farhoomand ; Peter Lovelock ; Pauline Ng</p> | <p>28p Product Number: HKU069 TN available</p> | <p>computers Case Time Frame Start: 1998 Case Time Frame End: 1998</p> | <p>model, Dell entered the PC market with a force and shook up the industry with its revolutionary, customer-oriented streamlined distribution style. This case tracks Dells' evolving business and industry and highlights its entry strategy for China. Teaching Purpose: To provide a basic understanding of the direct business-to-customer model; to suggest the limitations of using the direct model for global expansion; to teach the significance of timing for entry into new markets, particularly in the context of the direct model; to assess the potentials for conducting business online, and in particular the benefits of the Internet for business-to-customer trading; to examine the development of an appropriate strategy for Dell in China.</p> |
| <p>The De-Globalization of Marks & Spencer in 2001, An Update Robert A. Burgelman ; Philip Meza</p> | <p>Stanford 11p Product Number: SM87</p> | <p>Global, United Kingdom Industry Setting: retailing Gross Revenue: 8 billion pounds revenues Number of Employees: 70,000 Case Time Frame Start: 1999 Case Time Frame End: 2001</p> | <p>The venerable British retailer Marks & Spencer suffered a series of setbacks in the late 1990s. The company's performance, which had been solid for decades, quickly deteriorated, forcing the rapid turnover of chief executives and many restructurings. Perhaps the largest change the retailer made was the abandonment of its global expansion plans, withdrawing from continental Europe and trying to sell off assets in the United States, including the well-known clothiers Brooks Brothers. This case examines the changes Marks & Spencer made between 1998 and 2001, as the company tries to shore up its ailing core business, U.K. retail, while deciding on an appropriate global strategy.</p> |
| <p>IBM Corp. Turnaround Robert D. Austin Richard L. Nolan</p> | <p>HBS 19p Product Number: 9-600-098 TN available</p> | <p>Armonk, NY Industry Setting: computer hardware & software Company Size: Fortune 500 Gross Revenue: \$80 billion revenues Number of Employees: 300,000 Case Time Frame Start: 1991 Case Time Frame End: 1995</p> | <p>Describes the details of IBM's dramatic corporate turnaround in the early 1990's led by CEO Louis V. Gerstner. Accounts of events are from interviews with IBM executives. Covers the factors that led to the company's decline and actions taken to get to recovery. Teaching Purpose: To demonstrate how one company orchestrated perhaps the most impressive turnaround in corporate history</p> |
| <p>Chapter 7: Strategy Formulation: Functional Strategy and Strategic Choice</p> | | | |
| <p>Selecting a Hosting Provider Robert D. Austin</p> | <p>HBS 12p Product Number: 9-601-171 TN available</p> | <p>N/A</p> | <p>Asks students to develop criteria for selecting a web hosting company, then to select one of three profiled in case exhibits. In choosing a hosting vendor, students represent one of two companies: one a start-up, the other an industrial-age manufacturer. By assigning some students to represent the start-up and others to represent the manufacturing company, the instructor can tease out differences in criteria for</p> |

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| | | | these two types of companies. The two companies might well choose different hosting providers. Teaching Purpose: To introduce students to a new category of outsourcing decisions; the infrastructure of the evolving Internet provides a new slant on some old questions about how to choose business partners. |
| Documentum, Inc. Rajiv Lal ; Sean Lanagan | HBS 26p Product Number: 9-502-026 | Silicon Valley, CA Industry Setting: enterprise software Company Size: start-up Gross Revenue: \$2 million revenues Number of Employees: 20 Case Time Frame Start: 1993 Case Time Frame End: 1993 | Describes Jeff Miller's attempt to implement Geoffrey Moore's crossing the chasm ideas at enterprise software vendor, Documentum. Teaching Purpose: Illustrates marketing strategy tradeoffs and a market selection process. |
| Martin Smith: May 2002 G. Felda Hardyman ; Joshua Lerner ; Ann Leamon | HBS 16p Product Number: 9-802-160 | New York, NY Industry Setting: private equity Number of Employees: 20 Case Time Frame Start: 2002 Case Time Frame End: 2002 | Martin Smith, a recent HBS graduate, has just started with a leveraged buyout firm. His first assignment is to evaluate three different deals and make recommendations to the partners. As he studies the deals, he realizes that each has different merits and drawbacks and that his recommendation must take into account not only the specifics of each target company but also the situation of his firm, along with the stage of his career and that of the senior partner. Teaching Purpose: To introduce students to the many facets of deal evaluation and the fact that a "good" deal depends on many factors, including some particular to the partnership itself. |
| Incat Jonathan West ; Christian G. Kasper | HBS 40p Product Number: 9-601-045 | Tasmania, Australia Industry Setting: shipbuilding Gross Revenue: \$100 million revenues Number of Employees: 1,000 Case Time Frame Start: 2000 Case Time Frame End: 2000 | Incat is a cutting-edge manufacturer of high-speed aluminum catamaran ferries. The company has been an entrepreneurial success story, growing to be the largest private employer in its home state of Tasmania, Australia. By 2000, Robert Clifford, the company's dynamic CEO and founder, must choose between two lucrative orders for different ferry designs. One order builds off of the current 96-meter design while the other would push Incat to make a quantum jump to 200 meters. Analysis of the tradeoffs in this "bet-the-company" decision raises issues of manufacturing complexity, operations capabilities, and the challenges of sustainable growth. |
| Flow Components: International Sourcing Strategy Michael J. Enright ; David T. Kotchen | HBS 18p Product Number: 9-796-041 | United States Industry Setting: stainless steel flanges Gross Revenue: \$70 million revenues Case Time Frame Start: 1993 Case Time Frame End: | Flow Components, a U.S.-based manufacturer of stainless steel flanges, has undertaken an aggressive international sourcing strategy. The bankruptcy of a competitor that had followed a similar sourcing strategy provides an impetus to assess Flow Components' strategy. Teaching Purpose: Allows for the detailed assessment of a cost-based international sourcing strategy, including comparative cost information. |

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| Kuehne & Nagel in the Asia-Pacific Edmund R. Thompson ; Vanessa N. Clark | U. of Hong Kong 23p Product Number: HKU048 | Hong Kong Industry Setting: forwarding Case Time Frame Start: 1998 Case Time Frame End: 1998 | In the 1990s, freight forwarding had become a rapidly changing and dynamic industry. Vertical integration up the supply chain meant that third-party logistics providers could provide a "one-stop-shopping" concept to customers and achieve generally higher margins per transaction volume. Still in the grip of the Asian economic crisis, Kuehne & Nagel management consider a future strategy for their Asia-Pacific operations. The case covers several concepts relating to competitive strategy, corporate structure, and core competence. The principal objective is to highlight the juxtaposition of business management theoretical concepts with their application. Other objectives include: (1) analyze the related but discrete industries of physical freight forwarding and supply chain management logistics ; (2) decide which industry affords the most lucrative margins; (3) examine how firms in any sector structure and manage the coordination of value-adding activities; (4) consider how firms manage their structure in increasingly competitive global, regional, and local environments. |
| Building the Culture at Agilent Technologies: Back to the Future Charles A. O'Reilly III ; Grace Yokoi | Stanford GSB 31p Product Number: HR20 | United States Industry Setting: electronics Gross Revenue: \$174 million revenues Number of Employees: 47,000 Case Time Frame Start: 1999 Case Time Frame End: 2001 | In 1999, Hewlett-Packard (HP) split into two companies. The issue facing human resources (HR) had to do with creating loyalty and enthusiasm for a new company (Agilent) whose roots lay in an established institution with an extremely loyal workforce who identified with the HP brand. How could they create a new culture of more focus and accountability with the same people? Developing an organizational culture that supported business performance and accountability was the foremost HR task. This case provides detailed background on the company's key initiatives and projects to transform HR organization and culture in the new company. The HR transformation marked a change from an egalitarian, safe culture to a performance culture characterized by a strong meritocracy and a results-based rewards program. In 2001, the company faced increasing financial challenges that would test the newly developing culture. How could top management continue building the Agilent culture--especially in the face of layoffs and restructuring? |
| Cisco Systems: Web-enablement Richard L. Nolan Kelley Porter Christina Akers | HBS 24p Product Number: 9-301-056 TN available | Silicon Valley, CA Industry Setting: information technology Gross Revenue: \$8 billion revenues Number of Employees: 10,000 Case Time Frame Start: 1998 Case Time Frame End: 1998 | Describes how Cisco web-enabled their ERP systems and developed the "front office" systems to electronically link to their customers and suppliers. |

| Chapter 8: Strategy Implementation: Organizing for Action | | | |
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| Philips vs. Matsushita: A New Century, a New Round Christopher A. Bartlett | HBS 20p Product Number: 9-302-049 Video available TN available | Global, Europe, Japan Industry Setting: consumer electronics Company Size: large Gross Revenue: \$40 billion-\$60 billion revenues Number of Employees: 270,000 Case Time Frame Start: 1970 Case Time Frame End: 2001 | Describes the development of the international strategies and organizations of two major competitors in the global consumer electronics industry. The history of both companies is traced and their changing strategic postures and organizational capabilities are documented. Particular attention is given to the major restructuring each company is forced to undertake as its competitive position is eroded. Teaching Purpose: Illustrates how global competitiveness depends on organizational capability , the difficulty of overcoming deeply embedded administrative heritage, and the limitations of both classic "multinational" and "global" models. |
| Hermes Systems Michael L. Tushman ; Daniel B. Radov | HBS 16p Product Number: 9-400-056 | United States Industry Setting: computers/telecom Gross Revenue: \$10 billion revenues Case Time Frame Start: 1986 Case Time Frame End: 1995 | Covers the history of Hermes, a large telecommunications and network equipment company, as it grows from a single business firm to a diversified firm from 1980-95. Examines the use of entrepreneurial subsidiaries for product development and fast growth. Other issues include the challenges of managing ambidextrous organizations and the problems a CEO faces in keeping control of fast growing divisions. |
| Eli Lilly--1998 (A): Strategic Challenges Michael Y. Yoshino ; Thomas W. Malnight | HBS 22p Product Number: 9-399-173 | Global Industry Setting: pharmaceuticals Company Size: Fortune 500 Case Time Frame Start: 1998 Case Time Frame End: 1998 | Deals with key strategic challenges facing Eli Lilly, a highly successful U.S.-based drug company. Teaching Purpose: To help students develop appreciation of some of the very complex strategic issues faced by a major company in a research-intensive industry. |
| Eli Lilly--1998 (B): Emerging Global Organization Michael Y. Yoshino ; Thomas W. Malnight | HBS 15p Product Number: 9-399-174 | Global Industry Setting: pharmaceuticals Company Size: Fortune 500 Case Time Frame Start: 1998 Case Time Frame End: 1998 | Examines major issues faced by Eli Lilly as it evaluates the appropriateness of a focused matrix organization with extensive use of cross-functional teams. Teaching Purpose: To help students appreciate the complexities of a global organization where product/functional/geographic knowledge must be optimized. |
| Harvey Golub: Recharging American Express David A. Garvin Artemis March | HBS 23p Product Number: 9-396-212 Video and TN available | New York Industry Setting: financial services Company Size: large Gross Revenue: \$14 billion revenues Number of Employees: | Describes the large-scale change process initiated and led by Harvey Golub as CEO of American Express. Describes the organization he inherited, two successive waves of reengineering , his "principles-driven" approach to decision making, and his goal of converting American Express from a diversified financial supermarket to one unified operating company. Teaching Purpose: Introduces students to many of the basic principles in leading |

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| | | 70,000 Case Time Frame Start: 1980 Case Time Frame End: 1990 | transformational change, explores the requirements for effective reengineering , and examines a leadership approach based on values and a few core principles. Also shows how a CEO can move a large entrenched organization in new directions. |
| Acer, Inc.: Taiwan's Rampaging Dragon Christopher A. Bartlett ; Anthony St. George | HBS 20p Product Number: 9-399-010 Video available TN available | Taiwan and Global Industry Setting: computers Gross Revenue: \$3.2 billion revenues Number of Employees: 5,800 Case Time Frame Start: 1976 Case Time Frame End: 1995 | Describes the strategic, organizational, and management changes that led Acer from its 1976 startup to become the world's second-largest computer manufacturer. Outlines the birth of the company, the painful "professionalization" of its management, the plunge into losses, and the transformation under founder Stan Shih's radical "fast food" business concept and his "client server" organization model, which are put to the test when a young product manager in Acer America develops a radically new multimedia home PC with global potential. Shih must decide whether to give an inexperienced manager in a loss-generating subsidiary the green light. Teaching Purpose: To explore the links between global strategy and structure , to evaluate leadership of transformational change, and to examine development of global competitive advantage. |
| J.C. Penney Walter J. Salmon Jeanne M. Blasberg ; David Wylie | HBS 31p Product Number: 9-596-102 | Dallas, TX Industry Setting: retailing Gross Revenue: \$21 billion revenues Case Time Frame Start: 1990 Case Time Frame End: 1995 | J.C. Penney used sophisticated technology to preserve the company's decentralization , which gave the stores a strong voice in selecting inventory. The benefits gained from local market knowledge, however, had to outweigh the foregone savings from decreased vendor leverage and speed. J.C. Penney executives realized technology alone was not adequate to ensure effective merchandising. Looking ahead, they wondered what further changes could contribute to the goal of becoming an even more successful national department store chain. Would the balance between central and store responsibility have to be adjusted further to compete effectively with increasingly more centrally run retailers? |
| Chapter 9: Strategy Implementation: Staffing and Directing | | | |
| The Men's Wearhouse: Success in a Declining Industry Author(s): Jeffrey Pfeffer | Stanford GSB 27p Product Number: HR5 | San Francisco, CA Industry Setting: retail clothing Gross Revenue: \$500 million revenues Number of Employees: 4,000 Case Time Frame Start: 1997 Case Time Frame End: 1997 | George Zimmer, CEO of the Men's Wearhouse, is considering what has made the firm so successful; what, if anything, it should do differently to continue to succeed; and how to manage its growth and culture as the firm expands in the very competitive men's tailored clothing market. Retailing is the largest industry in the United States. Most retailing firms have traditionally been staffed with poorly paid, poorly trained, part-time help, and often experience tremendous turnover. Founded in 1973 in Houston, the Men's Wearhouse now has over 300 stores and is adding stores at the rate of 50 per year as it extends its geographic reach. This case provides information on the founder's beliefs, the firm's financial performance, the company's management practices, and detailed information on its various |

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| | | | training activities. |
| Specialty Medical Chemicals Author(s): Richard G. Hamermesh ; Lucinda Doran | HBS 23p Product Number: 9-399-094 | United States Industry Setting: medical Gross Revenue: \$425 million revenues Number of Employees: 1,600 Case Time Frame Start: 1998 Case Time Frame End: 1998 | A new general manager is supposed to rekindle growth. Seven months later, he questions the abilities of his direct reports . An organizational psychologist is brought in to assess his people. The general manager now has to decide who to keep and how to structure his direct report team. Teaching Purpose: To illustrate the issues a general manager faces when assembling his direct report team. |
| AvantGo Author(s): Alan MacCormack ; Kerry Herman | HBS 19p Product Number: 9-601-095 | Silicon Valley, CA Industry Setting: high technology/wireless/mobile Number of Employees: 310 Case Time Frame Start: 1998 Case Time Frame End: 2000 | Richard Owen, CEO of AvantGo, is preparing for a meeting in which he will set the human resource policy for the firm going forward. It has been three months since the company's IPO, and given the tremendous slump in hiring over the six months prior to the IPO, he knows that this meeting will set the expectations for the many annual evaluations that will follow. Uppermost in his mind is the decision over whether to implement a "forced-curve" grading scheme, and the implications of this decision on staff perceptions and notification. Teaching Purpose: To illustrate the challenges of a rapidly growing new technology venture, specifically with regard to the hiring, retention, and firing of new employees. Also examines the process of building a senior management team, including the decision of when to replace a CEO , how to do it, and with whom. |
| Hewlett-Packard Barcelona Division Author(s): Paddy Miller | IESE 21p Product Number: IES025 | Spain Industry Setting: electronics Company Size: Fortune 500 Case Time Frame Start: 1994 Case Time Frame End: 1994 | Briefly traces the history of the Barcelona Division of Hewlett-Packard from its inception in 1984 as a manufacturing unit producing under license to the present time, when it is a fully-fledged profit center responsible for its own global marketing, production, and distribution. The role and contribution of each of the general managers before the arrival of general manager Rich Raimondi is discussed. Raimondi is typical of many expatriate managers who arrive with minimal linguistic skills on their first assignments in Europe. How he manages the division to become a business unit during his three-year tenure is covered through various observations by his management team. Teaching Purpose: May be used in courses on managing change to focus on the issues facing expatriate managers. |
| Corning--1996-2000: Growing Corning Author(s): Michael J. Roberts ; Michael L. Tushman | HBS 35p Product Number: 9-401-035 | Corning, NY Industry Setting: glass Company Size: Fortune 500 Gross Revenue: \$5.3 billion revenues Number of Employees: 38,000 Case Time Frame Start: 1996 Case Time Frame | Focuses on Roger Ackerman's successful culture change effort--growing Corning. Presents a detailed description of Ackerman's effort, and the changes that transpired in the business, the culture, and the senior team. Teaching Purpose: Shows an example of a successful culture change effort. Highlights new issues as the business evolves and becomes more highly differentiated. |

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| Holy Cross Hospital: The Road to a New Culture Author(s): Jeffrey Pfeffer ; Victoria Chang | Stanford GSB 27p Product Number: HR16 | Ft. Lauderdale, FL Industry Setting: health care Gross Revenue: \$166 million revenues Number of Employees: 2,500 Case Time Frame Start: 1999 Case Time Frame End: 2001 | The senior management team at Holy Cross Hospital, a nonprofit hospital based in Florida, wanted to build a culture at the hospital that was different from the traditional authoritarian and hierarchical hospital cultures at other for-profit and nonprofit hospitals across the United States. CEO John Johnson developed a new cultural strategy based on the concept of putting people first. By 2000, Johnson was pleased with his progress, but he was also frustrated with the occasionally slow pace of change and wondered what he should do to move things forward more quickly. Johnson also felt that the cultural transformation was losing steam and he needed to revive employee enthusiasm. Teaching Purpose: To teach students how to transform a company's culture in a more traditional and financially strapped industry such as health care. |
| Maureen Frye at Quaker Steel and Alloy Corp. Author(s): John J. Gabarro | HBS 12p Product Number: 9-496-024 | Pennsylvania Industry Setting: metals Company Size: large Case Time Frame Start: 1995 Case Time Frame End: 1995 | Maureen Frye, assistant product manager at Quaker Steel and Alloy Corp., is asked to implement an action plan for changing the call pattern of the sales force. Currently the sales force is spending too much time on small accounts. Earlier Frye attempted to change their call patterns without success. Now with the express call mandate of top management she has to present a plan that will work. |
| Chapter 10: Evaluation and Control | | | |
| Vyaderm Pharmaceuticals Author(s): Robert L. Simons ; Indra A. Reinbergs | HBS 15p Product Number: 9-101-019 TN available | Seattle, WA Industry Setting: pharmaceuticals Gross Revenue: \$2.7 billion revenues Number of Employees: 17,500 Case Time Frame Start: 2000 Case Time Frame End: 2000 | In 1999, the new CEO of Vyaderm Pharmaceuticals introduces an Economic Value Added (EVA) program to focus the company on long-term shareholder value. The EVA program consists of three elements: EVA centers (business units), EVA drivers (operational practices that improve EVA results), and an EVA -based incentive program for bonus-eligible managers. Over the next two years, the implementation of the program runs into several stumbling blocks, including resistance from regional managers, who push for "line of sight" EVA drivers; the difficulty of managing a large number of EVA centers; and unexpected bonus adjustments due to poor EVA performance. The decision point focuses on the competitive situation in a business unit where the sudden exit of a competitor produces an unexpected one-time "windfall" in earnings. Vyaderm's top managers struggle with the question of whether to adjust the EVA results to prevent demoralizing managers in future years when EVA results are likely to decline. Teaching Purpose: Requires students to calculate EVA bonus payouts. |
| Identifying Value Creators Su Han Chan ; Ko Wang ; Mary Ho | U. of Hong Kong 16p Product Number: HKU185 | 1996 -2000 | Presents measures of financial performance and health for pairs of Asian and American companies in different industries from 1996 to 2000. The measures include economic profit (also known as Economic Value Added) and other classic measures, such as financial ratios and stock price performance. |

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| | TN available | | Teaching Purpose: To interpret the range of financial criteria presented and reflect on the consistency of those criteria in measuring value creation of firms across different industries in Asia and the United States and under different market conditions. |
| <p>Montefiore Medical Center Robert S. Kaplan Noorein Inamdar</p> | <p>HBS 16p Product Number: 9-101-067</p> | <p>New York Industry Setting: health care Case Time Frame Start: 1998 Case Time Frame End: 1999</p> | <p>Describes the implementation of the Balanced Scorecard management tool at a large urban medical center and its acceptance among the various constituencies. Elaine Brennan, senior VP of operations, has reorganized a highly functional health care organization into decentralized patient care centers and support units. Having recently endured the pain of a major downsizing, she wants the various constituents--senior managers, physicians, nurses, technicians, and the work force--to think about how to implement a new strategy focused on growth and patient care. But the existing measurement and management system reports only on costs and financial results. She introduces the Balanced Scorecard as a mechanism to increase attention to and accountability for quality, service, work environment, and employee outcomes, as well as revenues and costs. Teaching Purpose: 1) To illustrate the application of the Balanced Scorecard in a complex health care system and the importance of developing a management system that will support a new organizational structure and strategy. 2) To illustrate the role of leadership and communication in deploying a new management system.</p> |
| <p>Wells Fargo Online Financial Services (A) Robert S. Kaplan Nicole Tempest</p> | <p>HBS 18p Product Number: 9-198-146 (B) case available TN available</p> | <p>California Industry Setting: banking Case Time Frame Start: 1997 Case Time Frame End: 1997</p> | <p>Describes how Wells Fargo, the industry leader in electronic banking, implemented a Balanced Scorecard in its online financial services group (OFS) to track and measure performance. The OFS group develops and supports services that allow existing and future banking customers to transact via the Internet. The new division faces rapid change and must invest heavily in new technology and in the development of innovative products and services. OFS was finding it difficult to balance the need for a clearly articulated strategy and measurable objectives with the flexibility required in its dynamic environment. Wells Fargo had a culture that embraced financial metrics. Yet OFS management believed that its business could not be measured and evaluated on the basis of financial metrics alone. For example, the group was not yet profitable, yet it provided a critical component to the bank's long-term strategy. The OFS group believed that the Balanced Scorecard would allow them to develop a set of integrated, multi-dimensional measures to assess performance against its goals, and to communicate and update its strategy in a rapidly changing environment. With an extensive description of the operations and economic drivers of the online financial services business, the case asks students to use this information to develop a Balanced</p> |

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| | | | Scorecard for OFS. Teaching Purpose: Enables students to explore the role of the Balanced Scorecard measurement system in an entrepreneurial, rapidly-growing, technology-intensive business. |
| Cisco Systems, Inc.: Implementing ERP Robert D. Austin Richard L. Nolan Mark Cotteleer | HBS 19p Product Number: 9-699-022 TN available | Silicon Valley, CA Industry Setting: information technology Gross Revenue: \$8 billion revenues Number of Employees: 2,500 Case Time Frame Start: 1993 Case Time Frame End: 1995 | Reviews Cisco System's approach to implementing Oracle's Enterprise Resource Planning (ERP) software product. This case chronologically reviews the diverse, critical success factors and obstacles facing Cisco during its implementation. Cisco faced the need for information systems replacement based on its significant growth potential and its reliance on failing legacy systems. Case discussion focuses on where management was particularly savvy in contrast to where it was the beneficiary of good fortune. Teaching Purpose: To foster discussion of the complexities of implementing large-scale information systems. To illuminate some of the positive and negative steps taken by a leading company in its own implementation. |
| The CCMO: Incentives Game (Exercise) Jason R. Barro ; Brian Hall ; Jonathan P. Lim | HBS 14p Product Number: 9-902-197 | N/A | Provides an opportunity to gain insight about designing, negotiating, and responding to incentives . The setting is investment management. The basic structure of the game is as follows. A class is divided into a certain number of investment firms. Each company has one CEO and begins with four portfolio managers (PMs), who manage their portfolios by choosing from a restricted set of assets. Takes place over approximately two weeks and is divided into three periods. Each period will last from two to four days. At the end of each period, new funds flow to high-performing portfolios while funds flow out of poorly performing portfolios, simulating contributions from investors. CEOs and PMs negotiate compensation arrangements and PMs may move from one company to another, subject to some costs and rules regarding how much of their portfolio they take with them to their new companies. CEOs try to maximize the value of their companies at the end of the game whereas PMs attempt to maximize their total compensation during the game. Teaching Purpose: Designed to generate general insight about incentives , compensation, and negotiations in a world where workers have choices about where and how they want to work. |
| Chapter 11: Strategic Issues in Managing Technology and Innovation | | | |
| American Express Interactive Lynda M. Applegate | HBS 22p Product Number: 9-802-022 TN available | New York, NY and Redmond, CA Industry Setting: travel and information technology Case Time Frame Start: 1996 Case | Follows the protagonist, Sonia Sharpe, as she and her American Express Interactive Team attempt to develop and market an interactive, on-line, corporate travel service in a highly competitive environment. Looks at the possible resources and partnerships a company needs to succeed in the fast-paced world of computer software and information technology . Ends with Sharpe questioning whether (and how) to |

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| | | Time Frame End: 1998 | pursue international expansion and the integration of the Interactive Travel Service with other American Express services (for example, their corporate credit card service). |
| Moore Medical Corp. Andrew McAfee Gregory Bounds | HBS 18p Product Number: 9-601-142 | Connecticut Industry Setting: medical supplies Gross Revenue: \$124 million revenues Number of Employees: 303 Case Time Frame Start: 2001 Case Time Frame End: 2001 | Moore Medical is a medium-sized distributor of medical supplies to practitioners such as podiatrists and emergency medical technicians. It has relied on traditional customer channels such as catalogs, phones, and faxes to communicate product offerings, promotions, and availability, and to take orders. It is now attempting to transition into a "bricks and clicks" distributor with a strong Internet presence. It has already made substantial investments in an eCommerce web site and in "back office" ERP software to improve the fulfillment performance of its four distribution centers. The ERP software has not lived up to expectations in all areas, and the company must decide whether to invest in more modules for this system that might address its shortcomings. It must also decide whether to make a significant additional investment in customer relationship management software. Teaching Purpose: Examines the factors underpinning IT investment decisions. |
| Selecting a Hosting Provider (Exercise) Robert D. Austin | HBS 12p Product Number: 9-601-171 TN available | N/A | Asks students to develop criteria for selecting a web hosting company, then to select one of three profiled in case exhibits. In choosing a hosting vendor, students represent one of two companies: one a start-up, the other an industrial-age manufacturer. By assigning some students to represent the start-up and others to represent the manufacturing company, the instructor can tease out differences in criteria for these two types of companies. The two companies might well choose different hosting providers. Teaching Purpose: To introduce students to a new category of outsourcing decisions; the infrastructure of the evolving Internet provides a new slant on some old questions about how to choose business partners. |
| Mellon Investor Services Thomas J. DeLong ; Vineeta Vijayaraghavan | HBS 14p Product Number: 9-402-036 | New Jersey Industry Setting: financial services Number of Employees: 2,000 Case Time Frame Start: 1999 Case Time Frame End: 2001 | James Aramanda, head of Mellon Investor Services, must make decisions about how to change the focus of his business. He works with consultants to create a change strategy to enhance a business that is already doing well. Will he be able to get his professionals interested in changing the nature of the way they meet customer expectations and demands while simultaneously motivating and including his professionals in the process? Teaching Purpose: To teach organizational change in Human Capital course. |
| What's the BIG Idea? Clayton M. Christensen ; Scott D. Anthony | HBS 22p Product Number: 9-602-105 | Manchester, NH Industry Setting: kids/toys Gross Revenue: \$200,000 revenues | CEO Michael Collins must decide if and how a process he developed to further innovation in the kids' industry could port over to other industries. The process was based on Collins' experiences as an inventor and as a venture capitalist, and it allowed |

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| | | Number of Employees: 10 Case Time Frame Start: 2001 Case Time Frame End: 2001 | his company to be an intermediary between inventors and innovation -seeking companies. The process seemed to be working quite well in the kids' industry and Collins had to decide what would "travel" to a different vertical. Teaching Purpose: Demonstrates how innovation that might not happen internal to a company can happen once it is removed from a company's processes. Also raises questions as to whether you can develop a process to identify good invention ideas or whether it is an "art." |
| Du Pont Kevlar Aramid Industrial Fiber (Abridged) Clayton M. Christensen | HBS 10p Product Number: 9-698-079 TN available | Delaware Industry Setting: chemicals Company Size: Fortune 500 Case Time Frame Start: 1974 Case Time Frame End: 1974 | Describes Dupont's efforts to build commercial markets for its miracle fiber, Kevlar. Initially, it sought to create a market for Kevlar tire cord, primarily because its existing tire cord business was languishing. This market never developed, even after Dupont spent several hundred million dollars. Teaching Purpose: For use in courses relating to finding new markets for new technologies. A rewritten version of an earlier case. |
| IDEO Product Development Stefan Thomke ; Ashok Nimgade Publication Date: 6/22/2000 | HBS 21p Product Number: 9-600-143 TN available | California Industry Setting: service/design Gross Revenue: \$50 million revenues Number of Employees: 300 Case Time Frame Start: 1998 Case Time Frame End: 1998 | Describes IDEO, the world's leading product design firm, and its innovation culture and process. Emphasis is placed on the important role of prototyping and experimentation in general, and in the design of the very successful Palm V handheld computer in particular. A studio leader is asked by a business start-up (Handspring) to develop a novel hand-held computer (Visor) in less than half the time it took to develop the Palm V, requiring several shortcuts to IDEO's legendary innovation process. Focuses on: 1) prototyping and experimentation practices at a leading product developer; 2) the role of playfulness, discipline, and structure in innovation processes; and 3) the managerial challenges of creating and managing an unusually creative and innovative company culture. |
| Chapter 12: Strategic Issues in Entrepreneurial Ventures and Small Businesses | | | |
| Zipcar Myra Hart ; Wendy Carter | HBS 21p Product Number: 9-802-085 | Boston, MA Industry Setting: car rental Company Size: start-up Gross Revenue: \$235,000 revenues Number of Employees: 7 Case Time Frame Start: 1999 Case Time Frame End: 2000 | Provides a detailed description of the processes and tasks associated with creating a new venture in an emerging industry (subscription car-sharing for urban dwellers). Chronicles the entrepreneur's concept development, industry analysis, market research, identity definition, and brand building. Also provides background on writing the business plan, creating a budget and building financials, developing a management team, creating business partnerships, and financing the businesses. Teaching Purpose: Raises several issues--including how to manage the "chicken and the egg" process of building and testing the concept, getting resources, and engaging customers when starting a new venture. Provides examples of "bootstrapping" and creative fundraising and concludes with the question of how to grow the business strategically. |
| Enspire Learning | HBS | 2001 | An MBA student finds an e-education business and |

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| Roger Hallowell Bjorn Billhardt ; Frank Andrasco ; Hans ten Cate | 23p Product Number: 9-802-001 TN available | | must decide which customers to target and which products/services to produce. Examines the online education marketplace and encourages students to develop action plans to succeed in it. Teaching Purpose: Designed to place the reader in a situation he or she can empathize with and in which he or she can make recommendations that will create alignment among targeted customers, customer value propositions, and service delivery systems. Also illustrates the importance of a simple and intuitive customer interface for an Internet-based service and the approach successful firms have adopted to deliver such an interface. |
| ScreamingMedia, Inc. Paul W. Marshall Michele Lutz | HBS 26p Product Number: 9-801-371 TN available | New York, NY Industry Setting: computer-related services Company Size: start-up Gross Revenue: \$21.9 million revenues Number of Employees: 236 Case Time Frame Start: 2000 Case Time Frame End: 2000 | ScreamingMedia, a provider of content syndication and services, must shift its customer base away from Internet start-ups toward larger, more established companies to ensure future profitability. To achieve this goal, the company needs to retool the sales force, develop new products and services to meet the needs of new customers, and change its organizational structure to support the company's evolution. Teaching Purpose: To help students understand the difficult choices that entrepreneurs need to make, often with limited information and sense of urgency. Students will be asked to develop a new market strategy and action plan outlining steps necessary to achieve strategic goals: sales retraining, development of new products and services, and changing the organizational structure. |
| Howard Schultz and Starbucks Coffee Co. Nancy Koehn | HBS 43p Product Number: 9-801-361 TN available | Seattle, WA Industry Setting: retailing Gross Revenue: \$2.2 billion revenues Number of Employees: 37,000 Case Time Frame Start: 1982 Case Time Frame End: 2001 | Investigates the entrepreneur's strategic initiatives to make a mass market for specialty coffee in the 1980s and 1990s. These initiatives included the development of premium products, rapid expansion of company-owned stores--each with attractive retail environments and responsive customer service--and, especially, the creation of a strong brand. The case also devotes considerable attention to how Schultz built the Starbucks organization, examining the consistent emphasis he and his colleagues placed on the company's relationship with its employees, how Schultz financed Starbucks' early expansion, the significance of vertical integration in ensuring quality control, and how the company managed its phenomenal growth after 1993. Teaching Purpose: 1) To examine how, in the midst of widespread socioeconomic change, an entrepreneur and his company influenced millions of consumers' tastes, behavior, and daily lives, 2) to understand why Schultz and Starbucks came to lead the intensely competitive specialty coffee industry, and 3) to analyze the relationship between entrepreneurial brand creation and institution building. |
| Iggy's Bread of the World Kathleen Valley ; Alexis Gendron | HBS 14p Product Number: | Cambridge, MA Industry Setting: bakery Number of Employees: 130 | In January 1994, Igor and Ludmilla Ivanovic opened the doors of their bakery, Iggy's Bread of the World. This case describes their unusual mission statement and the way in which they try to bring a social |

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| | 9-801-282 TN available | Case Time Frame Start: 1999 Case Time Frame End: 2000 | consciousness mentality to a for-profit business. Six years later they have grown beyond their physical and administrative capacity. The Ivanovics must decide how to reconfigure the leadership structure of the company without losing their control over the fundamentals. Teaching Purpose: Explores direct vs. indirect influence, focusing on the difficulties inherent in learning effective indirect influence tactics where one is accustomed to using direct influence. Also explores issues in corporate culture and corporate reorganization. |
| OXO International H. Kent Bowen ; Marilyn E. Matis Sylvie Ryckebusch | HBS 19p Product Number: 9-697-007 TN available | New York, NY Industry Setting: kitchen tools and gadgets Gross Revenue: \$22 million revenues Number of Employees: 9 Case Time Frame Start: 1996 Case Time Frame End: 1996 | OXO, a kitchen tools and gadgets company, was started by a businessman who had 30 years of experience in the housewares industry. With his wife and son as founders, he creates a new niche in the gadgets industry for high-end gourmet stores. The company has headquarters in New York City, but it outsources product design to a NYC industrial design firm, manufacturing to Asia, and warehousing to a site in Connecticut in order to manage start-up costs and growth. Because of the veteran businessman's reputation and industry sense, the company grows quickly and in 1992 is sold for \$6.2 million to a large housewares distributor, General Housewares. The original owners stay on as consultants to the parent company and decide to turn over management of the company to a Harvard MBA who also has extensive industrial design experience. Innovative product design is the key to OXO's success, and the company has worked exclusively with one design firm based on royalties of sold products. The new managing director initiates new product category programs for the bathroom, the garden, and home baking. He must coordinate the outsourcing of the design and development function. |
| Chapter 13: Strategic Issues in Not-for-Profits | | | |
| Jumpstart Allen Grossman ; Arthur McCaffrey | HBS 27p Product Number: 9-301-037 TN available | United States Industry Setting: pre-school education Number of Employees: 25 Case Time Frame Start: 1993 Case Time Frame End: 2001 | Many in the nonprofit sector doubt whether organizational performance can be measured. Jumpstart, a 10-year-old nonprofit, developed performance measurement and management systems from its inception. The organization has experienced explosive growth and attributes a great deal of its success to creating a performance culture. Teaching Purpose: To analyze a sophisticated performance measurement and management system in a nonprofit organization. |
| American Heart Association: Reorganization of the Western States Affiliate Glenn R. Carroll Kristina Ho | Stanford GBS 19p Product Number: OD2 | United States Industry Setting: nonprofit organization Gross Revenue: \$42 million revenues Number of Employees: 250 Case Time Frame | In 1997, the American Heart Association (AHA) Western States Affiliate reorganized to increase fundraising revenues for the nonprofit . Some staff had been dissatisfied with the new scope and reporting structure of their positions. Roman Bowser, the executive vice president and CEO of the affiliate, made several adjustments to the organizational structure to deal with problems that arose with the organization and had other issues to consider now in |

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| | | Start: 1997 Case Time Frame End: 2002 | 2002 related to staff and local community volunteers--the lifeblood of the organization. Furthermore, a national AHS task force was recommending a reorganization of the AHA along the same lines that Bowser had used for his Western States Affiliate. Bowser wondered if the AHA could leverage his organizational model across disparate communities nationally and what the impact might be on the long-term viability of the AHA. Teaching Purpose: To analyze the reorganization of a company from a more general, geographical organizational design structure to one that is aligned by key activities. Also intended to give MBA students insight into the similarities between running a nonprofit organization and a for-profit company. |
| Chapter Enrichment Program Teams at the American Red Cross Jeffrey T. Polzer Anita Williams Woolley | HBS 16p Product Number: 9-402-042 | United States nonprofit/humanitarian Gross Revenue: \$2.5 billion revenues Case Time Frame Start: 1998 Case Time Frame End: 2001 | Describes a system for structuring, staffing, and leading teams to review local chapters of the American Red Cross. Mirroring professional service firms that use teams to serve clients, this system provides detailed guidelines that are designed to increase individual team members' efficiency and thoroughness. The protagonist at Red Cross headquarters who designed the system, however, is concerned that the structure she has provided is detracting from teams' overall creativity and integration. Highlights the tradeoffs of providing teams with too little structure (e.g., inefficiency, variable quality of team's work products) versus too much structure (e.g., team members have little opportunity to utilize their expertise and creativity). Invites action planning to adjust the structure so that teams are more integrated and creative, yet still efficient. Determining an appropriate role for the team leader is a key issue. Teaching Purpose: To demonstrate a system for structuring, staffing, and leading teams composed of people who do not know each other, yet must ban together quickly to integrate their individual areas of expertise. To allow discussion of how a person who is designing teams can achieve a balance between providing teams with too much structure versus too little structure. |
| Boston Lyric Opera Robert S. Kaplan Dennis Campbell | HBS 21p Product Number: 9-101-111 TN available | Boston, MA Industry Setting: performing arts Gross Revenue: \$7 million revenues Number of Employees: 30 Case Time Frame Start: 2001 Case Time Frame End: 2001 | The Boston Lyric Opera was the fastest growing opera company in North America during the 1990s. Having successfully completed a move to a larger facility in 1999, the board and general director recognize the need to develop a formal strategic planning and governance process to guide the company into the future. Board members, senior managers, and artistic leaders use the Balanced Scorecard as the focus of a multi-month strategic planning process that develops a strategy map and objectives in the four BSC perspectives for three core strategic themes. This case describes the high-level scorecard development, its cascading down to departments and individuals, and the directors' interactions, using the Balanced Scorecard, with the |

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| | | | artistic leaders and board of directors. Teaching Purpose: Demonstrates how the Balanced Scorecard is used for strategic planning and performance management in a performing arts organization. Can serve as an introductory class on the Balanced Scorecard or as a follow-up session after the scorecard has been introduced in a traditional for-profit setting. |
| Local Initiatives Support Corp. James E. Austin ; Kim Slack | HBS 21p Product Number: 9-301-124 | United States Industry Setting: nonprofit organization Gross Revenue: \$74 million revenues Number of Employees: 180 Case Time Frame Start: 2000 Case Time Frame End: 2000 | Local Initiatives Support Corp. (LISC) is a \$74 million nonprofit social enterprise that combats poverty by helping community development organizations to build affordable housing and create economic development opportunities through public-private partnerships. This case presents the dilemma for the CEO: whether to grow geographically or programmatically. The history of the organization is presented, along with many challenges that urban and rural community groups face, such as how to improve educational opportunities for their citizens. How LISC funds its operations, including the syndication of low-income housing tax credits, foundations, and private partnerships is described. Teaching Purpose: To expose students to an unusual business model that develops partnerships through innovative approaches to raising capital for projects to assist low-income citizens. Students learn how public-private partnerships are developed, how financing is arranged for affordable housing, and the challenge for growth in the community development Arena. |
| Maitri AIDS Hospice J. Gregory Dees ; Beth Anderson | Stanford GSB 24p Product Number: SI10 | San Francisco, CA Industry Setting: health services Gross Revenue: \$3.8 million revenues Number of Employees: 13 Case Time Frame Start: 2000 Case Time Frame End: 2000 | It's August 2000, and Maitri AIDS Hospice in San Francisco is reevaluating its approach to fundraising . In recent years, Maitri has been relying increasingly on government, corporate, and foundation grants. Yet Don Spradlin, Maitri's associate director for individual gifts who was hired in early 1999 to focus on individual donations and special events, has made some progress in increasing the number of individual donors over the past year and a half. He inaugurated two new earned income strategies, both of which have attracted new donors and positive publicity for Maitri. Nonetheless, individual donations still account for only 8% of annual operating expenses, and Spradlin is struggling with defining his purpose and that of individual donors within the traditionally grass-roots organization. |
| New Profit, Inc. | Manchester | not-for-profit | Having founded what they called a "venture |

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| James L. Heskett J. Gregory Dees ; Jaan Elias | Craftsmen's Guild 26p Product Number: MCG006 | Number of Employees: 2 Case Time Frame Start: 1999 Case Time Frame End: 1999 | philanthropy" operated like a hybrid between a venture capital fund and a philanthropy, New Profit's organizers are confronted with two issues: 1) the role that "investors" would be asked to play in the organization, and 2) the way in which management tools such as the Balanced Scorecard could be put to work in the service of the philanthropy. Teaching Purpose: Illustrates the use of for-profit management techniques in not-for-profit endeavors. |
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