

# The CASE Journal

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The Journal of  
the CASE Association

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# The CASE Journal Volume 2, Issue 1 (Fall 2005)

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## EDITORIAL POLICY

The audience for this journal includes both practitioners and academics and thus encourages submissions from a broad range of individuals.

**SCHOLARLY WORKS:** Cases with teaching notes; conceptual papers and papers reporting original research as well as the applied implications of others' research in terms of case teaching, research, and instruction; and creative learning, research and writing methods are encouraged. We request that submitters of empirical research provide appropriate data set analyses to allow for meta-studies (i.e. correlations matrices and chi-alpha's). Because of the broad appeal of the journal to practitioners and academics, *The CASE Journal* will not refuse to review a case or an article solely on the basis of format. However, if a case or paper is accepted, the final version for publication will be expected to adhere to the publication and manuscript guidelines. Cases and papers may be returned due to issues relating to writing style and grammar.

*The CASE Journal* encourages authors to submit often to the Journal. However, authors who are published in one publication year cannot be published a second time in that publication year. Rather, additionally accepted papers will appear in subsequent publication years. This policy does not apply to authors who submit papers for review with different second authors from what appears on the first accepted paper in any given publication year.

**CASES:** Those wishing to submit a case for potential publication should submit the entire case along with the completed teaching notes for review. If accepted for publication, only the case will be published along with a note for interested readers to contact the case author for the teaching notes. All review and publishing rules which apply to scholarly articles also apply for cases. Also, upon acceptance for publication, *The CASE Journal* requires that the author(s) submit a signed letter of liability release prior to publication. Authors are responsible for distributing the teaching notes as requested and their e-mail addresses will be provided for such purpose.

**INITIAL SUBMISSION:** *The CASE Journal* blind reviews submissions and all manuscripts submitted are to be original, unpublished and not under consideration by any other publishing source. To ensure the blind review, there should be no author-identifying information in the text or references. An abstract of 150 words or less should accompany the paper. This journal will only accept on-line submissions. Send one (1) copy to the editor by e-mail in MS-Word and/or IBM text format. A separate title page must accompany the paper and include the title of the paper and all pertinent author information (i.e. name, affiliation, address, telephone number, FAX number, and E-mail address). If any portion of the manuscript has been presented in other forms (conferences, workshops, speeches, etc.), it should be so noted on the title page.

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**LETTER FROM THE EDITOR**  
**Herbert Sherman**

Welcome (or welcome back)! For those of you who attended The Case Association Meeting last May in Springfield, Massachusetts (in conjunction with the Eastern Academy of Management) you know it was an exciting event. We had numerous case round table discussions, case presentations, and our highly lauded V.I.P. case session. We will have a special edition of *The Case Journal*, with our special editor Dr. James J. Carroll of Georgian Court University, featuring some of the cases from our 2005 sessions and focusing on case reviewing methodology and techniques. I invite all of our participants from last year's meeting to submit their cases and articles to *The Case Journal*.

This upcoming meeting in May of 2006 in Saratoga Springs is truly an event you do not want to miss as we celebrate CASE's 30<sup>th</sup> anniversary. Again, please feel free to submit your articles, cases, seminars, and work sessions to our program chairs (see EAM website for further details). I hope to see familiar faces as well as meet new ones so please come and join us!

Our third issue of *The Case Journal* brings us back to the premier issue as we continue our excursion with the fictitious character Professor Moore as he experiences first hand the trial and tribulations of case research. Tom Leach of the University of New England, based upon his own experiences, describes Dr. Moore's *Bogus Journey* through his first real challenge in writing field-based cases, obtaining clients' permissions to publish cases. Like any good tale, there is mystery, there is danger, and a real cliffhanger – will Professor Moore obtain permission or not? Read for yourself and find out!

Our second invited article, by James J. Carroll of Georgian Court University, like the prior work, is an extension of an article published in the premier issue. In this article, Dr. Carroll explores some of the significant topics that instructional case writers should be cognizant of when performing case research and case writing including: bias and misleading information, obtaining client permission to publish the case, disguising cases, decision focus, case writing style, and learning objectives (the teaching note). I was particularly intrigued by Dr. Carroll's list of case topics that may be of interest to students; an interesting first step to developing a case morphology.

The R.C. Bigelow Tea Company Case Study, by Laurence Weinstein, Sacred Heart University and Cindi Bigelow, R.C. Bigelow Tea Company, is our first published co-authored practitioner case. Ms. Bigelow in the case is confronted with a rather insidious conundrum, does she continue to market her tea products to the women 45+ who have historically comprised the core group of tea drinkers or does she broaden her target market to include younger adults, those who do not have a strong urge to drink tea. In order to assist her in determining whether college students could become tea drinkers, a SIFE team at a local college campus conducts a short term marketing campaign including market research. The results of the campaign are positive, tea consumption soared, but is that information a sufficient basis for jumping into this new market segment?

When I think of drinking a cup of tea, I also think of relaxing with a good book in front of a warm fireplace. Pauline Assenza & Alan B. Eisner of Pace University ask, why aren't you thinking about reading the Reader's Digest? Reader's Digest, once the stalwart magazine found in nearly every home and doctor's office, like tea, now appeals to a narrow market segment, the over 50 crowd. Bombarded by internet publications and greater competition within the industry, Reader's Digest needs a turnaround strategy that can leverage their brand name while relying upon an old form of publication and distribution. Can this firm adapt to the 21<sup>st</sup> century or will its products go the way of the buggy whip and the typewriter?

The last set of case offerings in the journal earmarks a new area that the journal would like to explore with the help of the readership, pedagogical innovations. In this section we would like to publish pedagogical cases, instructional methodologies, tools, rubrics, and articles that either venture "where no one has gone before" or "dare to be stupid" as well as our readers' responses to said material. With advice, counsel, and a fair amount of warning from Drs. James J. Carroll and Gina Vega, I humbly put forth a simple case writing technique – creating short, concise cases by quoting and or paraphrasing articles from newspapers, magazines, and annual reports. I have posted five of these case incidents in this section for the readers' perusal and comments and would appreciate like contributions.

## ARTICLE AND CASE ABSTRACTS

### **Case Research and Writing:**

#### **Professor Moore Can't Get There From Here**

Thomas C. Leach, University of New England

This article, written in the case format, is an extension of the article entitled “Case Research and Writing: Three Days in the Life of Professor Moore” published in The CASE Journal, Volume 1, Issue 1. It is intended to give the novice case writer insight into problems associated with obtaining the release for publication from companies where primary data had been collected. Related issues on case writing are also included.

### **The Anatomy of an Instructional Case from a Reviewer's Perspective**

James J. Carroll, Georgian Court University

This article is a continuation of the article entitled “A Primer on Case Reviewing” published in The CASE Journal, Volume 1, Issue 1. Used in conjunction with the article “Case Research and Writing: Three Days in the Life of Professor Moore”, this article should help both case writers and case reviewers understand the critical elements of what a reviewer should look for in the case and the teaching note.

### **The R.C. Bigelow Tea Company Case Study**

Laurence Weinstein, Sacred Heart University

Cindi Bigelow, R.C. Bigelow Tea Company

Ms. Cindi Bigelow, COO and third generation in her family to head the R.C. Bigelow Tea Company, located in Fairfield, CT, believed one strategy to move her business forward would be to attract a younger audience for her product line. Hot tea appeals primarily to women 45+ who typically drink the beverage for its soothing effects. A test market, designed to make hot tea more appealing to a college-age audience, was conducted at a nearby university by a Students in Free Enterprise (SIFE) team drawn from the chapter's membership. Key words: Target audience, market segmentation, demographics, market research, promotion mix, advertising, copy development, media selection.

### **Reader's Digest: Inform, Enrich, Entertain, and Inspire**

Pauline Assenza & Alan B. Eisner, Pace University

After decades of successful expansion, The Reader's Digest Association's products were mature. With an average readership age for the flagship *Reader's Digest* magazine of 50.3 in 2004, efforts to develop new products had so far failed to entice a significant number of younger customers. Following a financial downturn in 1996, positive financial results remained illusive. Several major changes instituted by Thomas O. Ryder, CEO since 1998, including acquisitions, re-capitalization, restructuring and systematic re-engineering of the corporate culture, had proven mildly successful, but RDA, as well as the entire publishing industry, faced a persistent decline in profitability. Could RDA fulfill its stated mission to create “products that inform, enrich,

entertain and inspire people of all ages and cultures around the world”, and could it do this by continuing to rely on the 80-year old *Reader’s Digest* magazine?

**Pedagogical Innovations: Mini-Cases on Business Ethics**

“Nike: Running Through the Court System”

“British Telecom: Doing the Right Thing or Doing Things Right?”

“Starbucks: Brewing a New Song”

“Is McDonald’s Clowning Around?”

“Ford and Firestone: Is it Really Just Found On Road Dead?”

This new section of the journal contains five mini-cases developed by the editor from material posted on the world wide web. Readers’ comments on these short cases as a pedagogical tool is sought and will be posted under “letters to the editor.” Future issues containing other innovative and/or cutting edge instructional tools.