PUBLISHER'S CHOICE INFORMATION SYSTEMS CASES

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Featured Information Systems Cases

W27514

Harry Rosen: Digitizing Customer Relationships

Vania Sakelaris; Nicole R.D. Haggerty

Ian Rosen, the recently appointed executive vice-president of Digital and Strategy at Harry Rosen Inc. (Harry Rosen), a successful men's retail chain founded by Ian's grandfather in 1954, must decide on a technology solution to support the advancement of his proposed digital strategy for Harry Rosen. The decision-making challenges he is encountering in early 2020 are compounded by the onset of the global pandemic and resulting impacts on the luxury menswear family retail business. Given the timing of the onset of COVID-19, the challenges and opportunities related to the replacement and upgrading of the company's e-commerce platform have been heightened. Strategic investment and the seamless execution of a new digital strategy are imperative components of the sustainability of the retailer's success. Ian must review and consider three different options, finalize his decision and proposal, and be prepared to launch earlier than originally planned.

Learning Objective: This case is well-suited to courses in management information systems, operations, and marketing at the undergraduate and graduate levels.

Working through this case will allow students to do the following:
Understand the role that technology can play in the advancement of a strategy.
Understand the role of business leaders in strategic decision-making related to the implementation of technology projects.
Assess the pros and cons of the technology solution options reviewed by the protagonist.
Familiarize themselves with the leader conviction required to advance a transformation effort in a high-risk macroeconomic environment and deal with the associated uncertainty.
Build an understanding of consumable commerce.

Publication Date: February 22, 2022
Discipline: Information Systems; Strategy;
Issues: information systems; information technology; digital transformation; e-commerce
Industry: Retail Trade;
Setting: Canada, Large organization, 2020
Difficulty: Undergraduate/MBA

W24908

Turbulent Times for TikTok's Platform Strategy

Nicole R.D. Haggerty; Vivian Zhang

At the beginning of 2021, TikTok was facing multiple market threats and had to decide what strategies to implement to manage them. TikTok was the world's largest short-video platform, with users in 155 countries. But along with great success in entering numerous geographic markets, TikTok faced various geopolitical pressures, mainly concerning the company's origins in China. The company had to consider how it could survive emerging geopolitical pressures, manage competitive threats from global technology giants as well as platform envelopment threats, and capitalize on its creative and somewhat addictive platform to expand its reach into new promising markets such as the African continent.

Learning Objective: This case is suitable for undergraduate- and graduate-level courses on innovation, strategy, and technological or political business environments. Given the complex and broad issues covered in the case, students should have already covered the basics of platform business models and diffusion of innovation theory. Alternatively, the case is suitable for teaching platform dynamics (including Christensen's disruptive innovation, network effects, platform envelopment, multi-homing, winner-take-all dynamics) and diffusion of innovation theory. This case asks students to consider the current market landscape and the situation TikTok is facing and assess its alternatives. After working through the case and assignment questions, students will be able to
use Christenson's classic theory of disruption to assess TikTok, having emerged from the low end of the market, and gain an understanding of the growing global short video platform market, including how it works and how revenue is generated;
analyze how technology platforms create value through a network effect and gain a deeper understanding of multi-sided platforms, platform competition, and platform envelopment;
understand the potential of short video platforms to disrupt the current landscape of the marketing industry and to create additional revenue streams by monetizing collected data;
apply the concepts of disruptive innovation and diffusion of

innovation; and
recognize how and when geopolitical issues become a challenge for technology firms (both start-ups and incumbents) and learn about options to address those issues.

Publication Date: September 21, 2021
Discipline: Strategy; Information Systems;
Issues: growth strategy; disruptive innovation; Chinese social media
Industry: Information, Media & Telecommunications;
Setting: India; United States; China; Global, Large organization, 2021
Difficulty: Undergraduate/MBA

9B21M060

JPMorgan Chase & Co.: Open Banking

Robert D. Austin; Jashan Puniya

JPMorgan Chase & Co. (JPMC), one of the world's largest banks, was confronting the advent of open banking in its retail banking business. In late 2020, policy makers and regulators were advocating movement toward open banking with growing enthusiasm as a way to stimulate competition in the financial services sector and thus, encourage greater value creation for consumers.

JPMC, however, seemed to embrace open banking while also resisting it, aggressively building out the technical infrastructure required for open banking while also blocking some third-party financial services companies from accessing customers' Chase bank accounts, citing data security and privacy concerns.

Open banking seemed fraught with risk, but might it represent new and significant opportunities for banks? In either case, what should the approach to open banking be for an established bank like JPMC?

Learning Objective: This case was developed for undergraduate, graduate, or executive courses that focus on the competitive impact of digital technologies. This could include courses on general information technology (IT) management or strategy, as well as more specialized courses on banking, financial services, or digital transformation and digitalized competition. After working through the case and assignment questions, students will be able to
understand the concept of open banking and how it might impact competitive dynamics in the financial services industry, and why regulators and policy makers are enthusiastic about the idea;
become familiar with technologies for sharing data, such as credentialed access (i.e., "screen scraping") and application programming interfaces (APIs), and their business advantages and disadvantages;
analyze the competitive dynamics operating between banks and smaller, more agile third-party firms (fintechs) including financial data aggregators and, in the background, large and powerful tech platforms such as Amazon.com Inc., Apple Inc., and Google;
think through the competitive implications for different parties (e.g., banks, fintechs) of different approaches to implementing open banking (e.g., bilateral deals versus industry-standard agreements and APIs);
make a recommendation on how a major bank might respond in the face of a move to open banking; and
consider the importance of regulatory frameworks in driving business change and the different means by which regulators might induce change (e.g., encouragement, mandates).

Publication Date: May 25, 2021
Discipline: General Management/Strategy; Information Systems;
Issues: financial services; digital transformation; digitalization; platforms; fintech
Industry: Finance and Insurance;
Setting: United States, Large organization, 2021
Difficulty: Undergraduate/MBA

9B21E005

When Trump Wins in Democratic Iowa Caucus: IT Project Risk Assessment

Yasser Rahrovani; Cem Torun

Following problems during the 2016 Iowa caucus, the Democratic National Committee mandated the Iowa Democratic Party (IDP) to publish raw vote totals for the upcoming 2020 Iowa caucus. This mandate coincided with the IDP's shift for the 2020 caucus from a partnership with Microsoft, Inc. to one with a political consultancy, Shadow Inc., for developing a vote-recording application (app)---a partnership choice believed by many to have been politically motivated. Shadow developers were given much less time and resources than Microsoft had been afforded for the previous caucus. When the time came for the app to be used on February 3, eligible users could not download the app, which led to several problems. The consequences of the problematic app led to embarrassment for the Democratic Party, political ridicule by the Republican Party, distrust among democrat voters, and ambiguity and a delay in election results.

Learning Objective: The case is intended for use in undergraduate- and graduate-level information systems (IS) core or elective courses. It is also suitable for courses in IT implementation, project management, and general management. The case articulates different categories of IT project risks (structural, processual, and contextual) that can contribute to IT implementation failure. It illustrates the complexity of the implementation process, even when the technology itself is not complex. It also showcases the

general sources of risk in IT projects. After working through the case and assignment questions, students will be able to do the following:
Understand and develop a process model.
Understand the complexity of integration at different levels.
Evaluate different sources of technical and non-technical IT project risks.
Develop plans to mitigate the risks in IT implementation.

Publication Date: February 23, 2021
Discipline: Information Systems; General Management/Strategy;
Issues: IT project risk; IT implementation; project risk; IT integration; risk assessment
Industry: Information, Media & Telecommunications;
Setting: United States, Medium organization, 2020
Difficulty: Undergraduate/MBA

9B19E016

Volkswagen Group: Adapting in the Age of AI

Ning Su; Yulin Fang; Duan Yang

In 2016, the Volkswagen Group (VW Group) announced a new future program, Together–Strategy 2025, which outlined the company's ambition of becoming "a world-leading provider of sustainable mobility" by 2025. The VW Group made it clear that innovation and technology would be essential enablers to the success of the new strategy. In 2018, VW Group, like other players in the automotive industry, was increasingly drawn to artificial intelligence (AI), which could be used in areas including manufacturing, autonomous vehicles, and data analytics.

Learning Objective: This case is suitable for undergraduate or graduate courses on digital transformation, internal corporate venturing, and the application of innovative technology (i.e., AI), especially in well-established companies or multinational corporations. This case is in the form of an in-class exercise that allows students to become familiar with the concept of artificial intelligence and to explore its potential for today's business transformation. It presents an initiative selection process that simulates the internal venturing mechanism of a multinational corporation. After working through the case, assignment questions, and exercise, students will be able to do the following:
Outline the steps involved in the digital transformation of industries such as the automotive industry.
Define internal corporate venturing, and list the steps in this process.
Describe artificial intelligence, and explain how it is applied in the automotive industry.

Publication Date: December 18, 2019
Discipline: Information Systems; Entrepreneurship; International Business;
Issues: artificial intelligence; digital transformation; global strategy; internal venturing
Industry: Manufacturing;
Setting: Germany, Large organization, 2019
Difficulty: Undergraduate/MBA

9B19E020

Samsung: The Internet of Things

Paul Okundaye; Nicole R.D. Haggerty

In 2014, the Internet of things (IoT) was still considered in its infancy stage. Over the next two years, the IoT matured and represented a considerable amount of uncertainty for the entire electronics industry. In 2016, the industry was at an inflection point regarding the technology, and its largest competitors had to make a choice: risk investing in research and development for a potential return (or failure), or stay the course and let competitors assume the risk. The chief executive officer of Samsung Electronics Co. Ltd. (Samsung), Boo-Keun Yoon, was in a position to take a stand in regard to the IoT and invest US$1.2 billion, which could have a major impact on the company's future. It was up to Yoon to decide.

Learning Objective: This case is suitable for business technology courses at the undergraduate- and graduate-level. The case can be used in a variety of topics related to the market entry of new or emerging technologies and the disruption in an industry caused by a new technology. Specifically, the case is suitable for discussions on a major global business deciding whether to adopt IoT technology as well as the dilemma of whether to increase or lower research and development investment in a new technology. After working through the case and assignment questions, students will be able to do the following:
Analyze the reasoning required when making new research and development investments as a technology company.
Recognize the complexities that exist for a giant industry incumbent trying to innovate and compete with smaller, nimbler start-ups.
Understand the IoT and what large-scale implications it represents for consumers and businesses.
Analyze how and why technology firms try to employ platform strategies.
Understand and apply the concepts behind "escalation of commitment" and the "sunk cost fallacy"—two major issues in the technology industry.
Analyze the technology industry and its inherent fast-paced competitive dynamics.
Identify and recognize the issues that arise when trying to develop a new technology as a business in an increasingly technologically dependent world.

Publication Date: September 13, 2019
Discipline: Information Systems; International Business;

Issues: Technology;Investments;Innovation;Human behaviour;Sunk-cost fallacy
Industry: Information, Media & Telecommunications;
Setting: South Korea, Large organization, 2016
Difficulty: Undergraduate/MBA

9B19E012

MarcPoint: Strategizing with Big Data

Wei Zhang; Liang Li; Ning Su; Ji-Ye Mao

As Shanghai MarcPoint Information Technology Co. Ltd. (MarcPoint) celebrated its fifth anniversary, its founder was quite pleased by what the company had achieved. MarcPoint was a start-up that offered marketing research services by analyzing user-generated content (UGC) with big-data technologies. The company had been successful and grown steadily since its inception in 2013. It was founded upon the realization that UGC was disrupting traditional marketing research and that big-data analytics provided the technological means to analyze the UGC efficiently and effectively. In 2018, the founder reflected on what MarcPoint's next steps should be: What technologies should they pursue? Which markets could they target for growth in the next five years? Should they try to transport MarcPoint's success to overseas markets? All in all, what needed to be done to sustain MarcPoint's growth and maintain its leading position in the turbulent technical and business environment?

Learning Objective: The case is mainly intended for use in upper-level undergraduate or graduate information systems (IS) courses such as IS strategy, information technology (IT) management, IT innovations, and IT entrepreneurship courses that involve discussions on how IT, in general, and big data analytics, in particular, can lead to competitive advantages. It can also be used in entry-level courses to introduce the concepts of big data and big-data analytics and to explain how IT alone cannot lead to competitive advantages. By working through this case, students will have the opportunity to do the following:

Understand e-commerce growth in China over the last decade.
Understand how big-data technologies disrupt marketing research, and appreciate, in a general sense, the disruptive power of information technology.
Understand how big data analytics can lead to competitive advantages.

Understand the complex relationships between big data and business, on the one hand, and big-data strategy and business strategy, on the other.
Discuss how to make and execute a business strategy that utilizes a company's strength in information technology, especially when the information technology is big-data related.

Publication Date: July 22, 2019
Discipline: Information Systems; Entrepreneurship; International Business;
Issues: Information technology;Business strategies;Strategic alignment
Industry: Professional, Scientific, and Technical Services;
Setting: China, Small organization, 2018
Difficulty: Undergraduate/MBA

9B19E008

Alfie: Working Out a Virtual Fitness Concierge Platform

Camille Grange

Alfie.fit (Alfie) was a Montreal-based consumer software technology start-up that offered a virtual fitness concierge service for time-strapped people who wanted to keep fit, no matter their busy schedule. The Alfie platform helped personal trainers and trainees connect and interact with each other and supported the management of the transaction between them. However, Alfie faced several challenges, including the common chicken-or-egg problem of value-added intermediaries in their entry phase. As Alfie celebrated its one-year anniversary of being officially available to the public, the founders needed to make strategic decisions regarding the platform's design, scope, and future direction.

Learning Objective: The case focuses on the challenges associated with designing and managing a multi-sided platform (MSP)—a business that focuses on enabling value-creating interactions between interdependent constituents. The case is designed for courses in the domains of strategy and digital strategy at the undergraduate, graduate, or executive level. It can also be used in a graduate or undergraduate course involving the topics of entrepreneurship (especially digital entrepreneurship), digital strategy, digitally-enabled industry transformation, and MSP business model design and development. After working through the case, students will be able to do the following:
Understand and apply the foundational concepts associated with MSPs (e.g., sides, value unit, filters, core interaction, search cost, network effects, critical mass).
Understand the role of industry context (e.g., size/growth, fragmentation, information asymmetry, technology advantage) in the success of an MSP.
Become familiar with the key challenges associated with the building of successful MSPs, including attracting interdependent sides, supporting their interactions, and enabling quality matches.
Learn about strategies that can help address the challenges MSPs face, which relate to making vital choices with regard to which user group(s) to support, which functionalities and services to offer, and which filtering and transaction

support mechanisms to design.

Publication Date: May 28, 2019
Discipline: Information Systems; Entrepreneurship;
Issues:
Start-ups;Strategy;Entrepreneurship;Platforms;Network effects;Critical ratio;Platform design
Industry: Arts, Entertainment, Sports and Recreation;
Setting: Canada, Small organization, 2018
Difficulty: Undergraduate/MBA

9B18E007

TD Bank Group: Building an Effective Enterprise Data Management Policy

Murat Kristal; Glenda Crisp; Connie Bonello; Katherine Heighington

Glenda Crisp became the chief data officer of TD Bank Group in October 2015. The Office of the chief data officer had only been established in 2013; the scope of the department still needed to be fully defined, and the original enterprise data governance policies needed to be updated. Crisp saw issues in a variety of areas, such as organizational structure, the processes used to manage data governance practices, and technology, all of which needed to be identified and prioritized. An implementation plan then needed to be developed.

Learning Objective: This case can be used in an undergraduate or a graduate-level course related to data management, strategy, and business intelligence implementation. Upon completion of this case, students should be able to do the following:

Identify the internal and external challenges that characterize the situation
Posit the necessary critical steps involved when modifying key policies and procedures

Publication Date: March 14, 2018
Discipline: Information Systems; International Business;
Issues: analytics, BASEL, data management
Industry: Finance and Insurance;
Setting: Canada, Large organization, 2015
Difficulty: Undergraduate/MBA

9B18E002

UCB: Data is the New Drug

Stijn Viaene

At the end of 2012, the chief information officer (CIO) at UCB, a global pharmaceutical company based in Brussels, started to implement analytics as a service. Between 2012 and 2016, he put this vision into practice, introducing agile sprints and proving the competence of analytics within the organization, and at the beginning of 2016, he felt the company was ready to upgrade its analytics capability. As he prepared to meet with UCB's chief executive officer in March 2016, the CIO considered how to advise the board as the organization worked to make an impact with analytics and big data against the backdrop of digital turbulence in its strategic environment. How could UCB balance empowerment and bottom-up experimentation with enterprise focus and control? What was the best location for analytics roles and responsibilities within the organization?

Learning Objective: This case has been designed to be used in graduate or post-graduate level courses on business strategy, digital transformation, information systems management, data and analytics, and innovation management. After discussing the case, students should be able to do the following:

Describe the disruption caused by digital technologies in the pharmaceutical industry.
Illustrate how the availability and use of data and analytics can alter the notion of customer value in a specific industry.
Discuss the business practices and organizational culture an organization requires in order to effectively compete based on analytics in a digital world.
Explain the role of a chief information officer in enabling an organization's competitive advantage with respect to data and analytics.
Discuss the responsibilities of an executive team in helping an organization become an analytical competitor.

Publication Date: January 25, 2018
Discipline: Information Systems;
Issues: analytics, digital, transformation, big data
Industry: Health Care Services;
Setting: Belgium, Large organization, 2016
Difficulty: MBA/Postgraduate

9B17E016

Netflix Inc.: The Disruptor Faces Disruption

Chris F. Kemerer; Brian Dunn

Netflix Inc. (Netflix) had surpassed Blockbuster, the previous movie rental leader, before making the successful transition to digital delivery of video content. But despite Netflix's success, in 2017, numerous competitors, including both established, mainstream content producers and digital upstarts, were making it difficult for Netflix to recreate its earlier dominance. Critics pointed to Netflix's slowing acquisition of subscribers and accelerating debt levels. Netflix's chief executive officer was confronted with disruption from a variety of digital rivals. How should he respond? Should Netflix continue to try to be a content producer, competing with Hollywood's industry leaders? Should it form a partnership with other media companies to align everyone's incentives? Perhaps it could move into other media content areas outside of traditional entertainment. Further, there remained the question of how to treat its legacy DVD-by-mail business. As the incumbent firm, Netflix needed to respond to competitors and avoid a fate similar to that of Blockbuster.

Learning Objective: This case was written for undergraduate and post-graduate courses in information systems and technology strategy. It offers a vehicle for students to thoroughly explore Clayton Christensen's disruptive innovation concept. In particular, it offers the opportunity to see two disruption examples in one case. Through the case, students will
understand both demand-side and supply-side disruption;
analyze multi-objective management of a portfolio of both mature, cash-cow lines of business and emerging, less certain business delivery innovations;
understand the economics of digital goods and platform businesses, including high-fixed-cost and low-marginal-cost production functions and the cross-side network effects inherent in platforms; and
discuss new technology risk management, particularly with respect to rapidly changing and uncertain information technologies.

Publication Date: November 27, 2017
Discipline: Information Systems;
Issues: technology, creative destruction, disruptive innovation
Industry: Information, Media & Telecommunications;
Setting: United States, Large organization, 2017
Difficulty: Undergraduate/MBA

9B17E014

Dow Chemical Co.: Big Data in Manufacturing

Mustapha Cheikh-Ammar; Nicole R.D. Haggerty; Darren Meister; R. Chandrasekhar

In 2012, a pilot study undertaken by the data services team of the Dow Chemical Company in the polymer division of the multinational company's Midland, Michigan, plant had revealed an uncanny trend on the company's shop floor. Plant engineers were working for the data; the data was not working for them. The data services director saw an opportunity to reverse the trend through the deployment of big data capabilities and, more specifically, enterprise manufacturing intelligence (EMI), a subset of big data. How should he gain user acceptance of the proposed EMI?

Learning Objective: The case can be used in undergraduate, graduate, and executive education programs focused on information systems. The case gives students the opportunity to do the following:
Describe the main characteristics of big data.
Explain how big data analytics can add value to a firm's manufacturing operations.
Discuss the challenges faced by an in-house data analytics division in fulfilling its strategic mission.

Publication Date: November 17, 2017
Discipline: Information Systems; International Business;
Issues: big data
Industry: Manufacturing;
Setting: United States, Large organization, 2012
Difficulty: Undergraduate/MBA

9B17E009

Tech Talk: Creating a Social Media Strategy

Arpan Kumar Kar; Reema Aswani

Tech Talk is an electronic content publishing portal that publishes articles on information and communication technologies. The articles cover specialized areas such as business analytics, e-governance, e-commerce, web technologies, big data analytics, software project management, telecommunication systems, business management theories, service science, e-payments, and Internet marketing. As a growth strategy, the co- founder of Tech Talk wants to draw traffic by creating a larger social media presence. He wants to use established strategies, and has the following questions: How should he strategize the interaction with readers on social media? With so many platforms like Facebook, Twitter, and LinkedIn, which ones should he focus on? Should he manage the social media marketing in-house or outsource it?

Learning Objective: This case can be used at the undergraduate and MBA level during focused sessions of e-business, digital marketing, web analytics, and

information systems courses, and works best toward the middle of the course. After completing the case, students should be able to do the following:
Discuss the electronic content publishing industry and its competitive landscape.
Summarize the different ways websites get traffic and the role social media can play in building traffic.
Outline the different models for social media promotion, including both ethical and non-ethical strategies for building social presence.
Explain how social media analytics provide insights for marketing.
Describe key performance indicators available from Facebook and Twitter analytics.

Publication Date: July 19, 2017
Discipline: Information Systems; Entrepreneurship; International Business;
Issues: social media, data analytics, digital marketing, business analytics, content marketing
Industry: Information, Media & Telecommunications;
Setting: India, Small organization, 2016
Difficulty: Undergraduate/MBA

9B16E005

Lumière: Supporting a Virtual Workspace on the Cloud

Deepa Kajal Ray; Lakshminaryana Seshadri Subramanian

In early 2015, the chief information officer at Lumière Business Solutions (Lumière) was reflecting on the impact of technology on the company's business performance. Lumière had been using cloud technology to provide clients and employees 24/7 access to project progress and documentation. Clients appreciated the fact that, despite being a small firm, Lumière was as competitive and quick to respond as any other big market-research company. What were the factors that had made this adoption easy? How much of the firm's efficiency could be attributed to the cloud? So far, most of Lumière's applications on the cloud had been sourced from Google Marketplace, but with other players like Microsoft getting into cloud technology aggressively, should Lumière start to explore these new offerings as well? Given the trade-offs that Lumière had made while choosing the cloud, would this technology continue to pay off in the future?

Learning Objective: This case is designed to be used in MBA classes for introductory courses in Information Systems (IS) in general and IS for small-to-medium enterprises (SMEs), as well as courses that deal with emerging technology. After completion of the case, students should be able to:
Understand cloud computing concepts and their application to business.
Understand how cloud computing can be used by SMEs to create value for the organization.
Learn about the various organizational factors that can lead to successful adoption of any new technology.
Understand the concept of business process re-engineering and the role it plays for any business to adapt to new technology.

Publication Date: February 26, 2016
Discipline: Information Systems; Entrepreneurship; International Business;
Issues: Cloud computing; BPR; technology adoption; SaaS
Industry: Other Services;
Setting: India, Small organization, 2015
Difficulty: Undergraduate/MBA

9B14E021

Disrupting Wall Street: High Frequency Trading

Derrick Neufeld; Brad Evans

Michael Lewis's book Flash Boys, published in 2014, revealed to the public numerous controversial Wall Street trading practices made possible by advances in technology as well as regulatory changes that were (ironically) intended to improve pricing fairness in the financial markets. Lewis's story focused on the man who blew the whistle: Brad Katsuyama, a Canadian banker who ran the New York trading desk for the Royal Bank of Canada. In 2010, he had noticed some odd system responses to his trading requests and began to ask questions. The answers he discovered, and publicized, about high frequency trading set off a firestorm regarding the moral integrity of the financial markets. Very few people understood what was happening, and fewer still comprehended the central role played by information technology.

Questions remain: How does information technology influence our concept of wealth? Why do "flash crashes" occur? Are the markets rigged? Will the next disruption to the financial markets involve technology?

Learning Objective: This case is appropriate for MBA or undergraduate students taking information systems core or strategy courses. Its objectives are to examine:

How stock exchanges operate.
The disruptive nature of technology.
The ethics of finance.
Regulations and unintended consequences.

Publication Date: October 30, 2014
Discipline: Information Systems;
Issues: Information technology; stock exchange; ethical issues; United States
Industry: Finance and Insurance;
Setting: United States, Large organization, 2014
Difficulty: Undergraduate/MBA

9B14E014

Information System Strategy at Neelkanth Drugs

Susmi Routray; Rajendra Nargundkar; Shweta Saini; Reema Saxena

Neelkanth Drugs Pvt. Ltd. (NDPL), one of the leading pharmaceutical distributors in Delhi, was making plans for further expansion, and the dynamic nature of the business was leading this small- and medium-sized enterprise towards implementing an enterprise resource planning (ERP) system. The company's head of information technology had prepared a complete report on the various ERP solutions available for NDPL and presented it to the chief executive officer (CEO). According to this analysis, cloud-based ERP was the best solution out of the various options available. The CEO was indecisive because of NDPL's past cloud experience, which had been disruptive and unsatisfactory, to say the least. The CEO pondered whether it would make sense to go for a cloud-based ERP solution, or whether it would make more sense to look for an alternative that may not be as cost-effective but that would entail less risk.

Learning Objective: The case can be used in the following areas: management information systems, strategy and emergent technologies.

Understand the operations of the pharmaceutical sector and its value chain.
Understand how this information-centric sector can leverage information sharing for competitive advantage.
Understand how small- and medium-sized enterprises can leverage information sharing even with budgetary constraints and the challenges associated with cloud computing.

Publication Date: August 22, 2014
Discipline: Information Systems; International Business;
Issues: Cloud computing; enterprise resource planning; information sharing strategy; India
Industry: Information, Media & Telecommunications;
Setting: India, Medium organization, 2013
Difficulty: MBA/Postgraduate

9B14E004

Aztek Chocolate Studio: Accounting System Software

Derrick Neufeld

In late 2013, the founder of Aztek Chocolate, a candy manufacturer, in Winnipeg, Manitoba, is confronted with making an accounting system selection decision. He has two traditional options — outsourcing to an accounting or bookkeeping firm versus using an internally developed spreadsheet or commercial software package — as well as a third "hybrid" option — using an accounting cloud, or Software-as-a-Service, service provider. Sales are starting to flow in, and chocolates are shipping out, but he realizes he must now attend to setting up financial control and reporting systems before he loses control of the new firm's financial performance. Should he hire an accountant, manage the finances himself with a commercial accounting software package or use an accounting cloud service provider?

Learning Objective: To introduce students to alternative financial control information systems for a new business start-up.
To explore and understand the benefits and risks of Software-as-a-Service (SaaS) cloud services.
To give students hands-on experience setting up a preliminary accounting system.

Publication Date: March 13, 2014
Discipline: Information Systems; Entrepreneurship;
Issues: Software-as-a-Service (SaaS); accounting; computer applications; Canada
Industry: Professional, Scientific, and Technical Services;
Setting: Canada, Small organization, 2014
Difficulty: Undergraduate/MBA

9B14E002

Volkswagen Group: Driving Big Business With Big Data

Ning Su; Naqaash Pirani

The Volkswagen Group (VW Group) had set a firm-wide "Strategy 2018," which sought to make Volkswagen "the most successful and fascinating automaker in the world by 2018." According to the strategy, the company would reach annual sales of 10 million vehicles worldwide. To achieve this ambitious goal, VW Group placed "intelligent innovations and technologies" at the top of its agenda. Big data, broadly defined, represented an important opportunity for the company. In this exercise, the class will be divided into teams, and each team will design an initiative that leverages big data to help the VW Group make significant progress towards its objective. The teams will present their initiatives at the upcoming executive meeting, at which time the best initiative will be selected.

Learning Objective: To introduce big data.
To simulate an internal corporate venturing process.
To explore the potential of emerging technologies for businesses.

Publication Date: February 03, 2014
Discipline: Information Systems; International Business; Entrepreneurship;
Issues: Big data; technological innovation; growth strategy; internal venturing; global
Industry: Manufacturing;
Setting: Global, Large organization, 2014
Difficulty: Undergraduate/MBA

9B13E030

Caterpillar Tunnelling: Revitalizing User Adoption of Business Intelligence

Frances Leung; Murat Kristal

Caterpillar Tunnelling Canada Corporation, a Toronto-based subsidiary of the U.S. company Caterpillar Inc., specializes in the custom design and manufacture of tunnelling boring machines used in the construction of transportation and utility tunnels such as subway, sewage and telecom cable tunnels. After the acquisition by Caterpillar, the company was chosen as one of the sites to undergo enterprise resource planning (ERP) transformation. After over a year of localization effort to adapt the corporate ERP template to the subsidiary's business processes, the project was called off due to both the strained local resources and the significant gap between the parent company's repetitive manufacturing model and the subsidiary's concurrent engineering/project-based model. Moreover, the lack of executive buy-in and a mandate in establishing company-wide performance metrics and consistency in business semantics led to sporadic user adoption of business intelligence tools and the creation of sometimes irreconcilable reporting. The business resource manager and head of finance has to rethink the management of business intelligence technologies and come up with a strategy to achieve coherent data analytics for effective business decision making.

Learning Objective: To examine the pitfalls of a business intelligence implementation that lacks top management support.
To illustrate the post-acquisition challenges related to information technology integration at the site of the subsidiary of a large corporation.

Publication Date: November 29, 2013
Discipline: Information Systems;
Issues: Enterprise resource planning; business intelligence; data analytics; Canada
Industry: Manufacturing;
Setting: Canada, Medium organization, 2012
Difficulty: Undergraduate/MBA

9B13E018

VINSUN Infra Engineering: ERP on Premise or on Cloud

Sumedha Chauhan; Sangeeta Shah Bharadwaj

The managing director of a small- to medium-sized electrical firm faces a major challenge: he realizes that the firm he founded has grown so significantly that information management has become very difficult. For solving issues of data integrity, redundancy, incompleteness and backup, he obtains quotations for implementation of enterprise resource planning from different vendors. Meanwhile, he discusses the issue of implementing the new system with his management team, who respond in different tones, leaving him confused. He also has to ensure that the initiative does not put strain on the firm's finances. He ponders various options such as whether to adopt enterprise resource planning on premise or on cloud and whether to go with the safe but costly option of engaging a well-established firm or to risk dealing with a start-up.

Learning Objective: To expose students to decision-making in a small- to medium-sized enterprise on the adoption of emerging technologies.
To understand the cost drivers of enterprise resource planning on premise (product) and on cloud (software as a service).
To understand the paradigm shift in costing of information technology services as a utility.
To conduct a cost benefit analysis with the long-term view of software as a product versus software as a service.
The case is appropriate for courses in the concepts in management information systems (MIS), managing IT services, business enterprise, enterprise resource planning and emerging information technologies.

Publication Date: August 07, 2013
Discipline: Information Systems; International Business;
Issues: ERP; cloud computing; software as a service; information management; India
Industry: Professional, Scientific, and Technical Services;
Setting: India, Small organization, 2010
Difficulty: MBA/Postgraduate

9B13E002

Intel Corp. - Bring Your Own Device

V. Joseph Compeau; Nicole R.D. Haggerty; R. Chandrasekhar

Since early 2009, the information technology (IT) division of a leading manufacturer of semiconductor chips had noticed a growing trend among the company's 80,000 employees worldwide to bring their own smartphones and storage devices to their individual workstations. Recognizing that Bring Your Own Device (BYOD) was not a passing fad but a growing phenomenon, the company decided in January 2010 to formally implement this initiative. As the company's chief information security officer prepares for a full rollout of BYOD, he revisits the issue of ensuring security of corporate data stored on devices owned by individual employees. He also wonders how Intel should respond to the demand for e-Discovery, wherein a litigant could seek access to internal documents stored on devices not owned by the company. He also reflects on a more fundamental and strategic issue: How can Intel extract value from the BYOD initiative and turn this initiative into a new source of competitive advantage?

Learning Objective: The case provides an opportunity for students to step into the shoes of the chief information security officer of a global enterprise, who is considering the implications of implementing BYOD. Students are required to look at the situation from three major perspectives: managing security risk, responding to e-Discovery requests from courts of law and extracting competitive advantages from the new initiative.

Publication Date: February 15, 2013
Discipline: Information Systems; International Business;
Issues: Value Addition; Information Security; Mobile Devices; Competitive Advantage; e-Discovery; United States
Industry: Manufacturing;
Setting: United States, Large organization, 2010
Difficulty: MBA/Postgraduate

9B11E040

Pearson's Successmaker: Putting the Customer First in Transforming Product Development Processes

T.S. Raghu; Collin Sellman

Pearson Plc is an education company that operates worldwide, with headquarters in London, England. Its six primary business units are North American Education, International Education, Professional, The Financial Times, Interactive Data, and Penguin Publishing. The vice president of product management within the Digital Learning division of the North American Education unit based in Chandler, Arizona, begins to transform the product development processes to better meet the needs of his customers in the education market, specifically in transitioning from using an off-shored Waterfall software development model to an on-shore Agile model.

When the vice president first joined Pearson a year earlier, the Digital Learning unit had spent significant resources developing a major upgrade for one of its educational software products. The first version of this new product was challenged by the disconnect between what the software development group was delivering and what the vice president's customers desired. He is now faced with a decision to continue focusing on the specific methodology the group had implemented (Scrum) or move to a new one (Kanban). Additionally, he has to consider expanding his focus to help drive Agile methodologies both with other groups in his business unit and outside his business unit. These decisions must be made at a potentially critical time for his products as his organization deals with the growing pains associated with the shift to Agile.

Learning Objective: This case is relevant to classes in marketing, management, and information technology, as it examines the interrelationship between technical product development processes and a firm's market performance. Instructors can tailor the discussion to focus more on the technical aspects of different product development processes or the marketing aspects of how firms can be more effective as they work to meet customer needs. In an information systems class, this case can be used to discuss innovative approaches to designing and managing collaborative and iterative business processes. The case can serve as an example of an approach to apply Lean manufacturing principles in collaborative work contexts. The case can also be used in courses related to IT project management to discuss alternatives to traditional project management techniques in software development projects. In a business-to-business marketing or new product development class, this case can be used when discussing the management of innovation and the new product development process. Discussion in this context can focus

on the characteristics of successful product innovation in technology markets and how development methodologies can drive a firm's product performance. The specific teaching objectives of this case are:

Describe the interrelationship between product or software development methodologies and market performance.

Compare and contrast Waterfall and Agile development methodologies as approaches to optimizing a firm's product value proposition.

Illustrate the process of managing and evaluating changes in new product or software development methodologies.

Publication Date: February 23, 2012
Discipline: Information Systems; Marketing; Operations Management;
Issues: Product Development; Process Design; Agile Methodology; Systems Development; Educational Software; United States
Industry: Information, Media & Telecommunications;
Setting: United States, Large organization, 2011
Difficulty: Undergraduate/MBA

9B11E025

1-888-Junk-Van

Derrick Neufeld; Liliana Lopez Jimenez

The case describes the selection of an information technology (IT) product to support the operations of 1-888-Junk-Van, a small waste-collection business. Marcus Kingo, the business owner, has five alternatives from which to choose: a database upgrade, contracting out development of a new software application, using Google Docs, using an online tool framed as Platform as a Service (PaaS), or implementing a small-business enterprise resource-planning (ERP) system. Each option presents strengths and weaknesses, and students are left to make a decision. The case exemplifies the IT deployment challenges faced by small companies.

Learning Objective: The case supports three primary teaching objectives:
To develop an understanding of the links between industry conditions, company specifications, and the role of IT, particularly in the context of supporting operations with IT.
To consider the challenges of small start-up companies and the particularities of IT deployment.
To explore and assess different criteria and selection mechanisms that can be used for choosing among competing IT offers that are presented as potential solutions to a business problem.
These objectives are aligned with most information systems courses at both the undergraduate and postgraduate levels. The case allows students to assess the impact of IT in doing business, to understand the role IT can play for leveraging organizational capabilities, and to grasp how important it is for today's managers to be able to make well-informed IT decisions from business as well as technical perspectives. By focusing on a small, recently founded firm, the case addresses a growing interest by student audiences in entrepreneurship, without compromising IT management issues that are common to firms of all sizes.

Publication Date: August 30, 2011
Discipline: Information Systems; Operations Management; Entrepreneurship;
Issues: Information Technology; IT Selection and Evaluation; Small Companies; Virtual Business; Cloud Computing; Waste Management
Industry: Administrative, Support, Waste Management and Remediation Services;
Setting: Canada, Small organization, 2009
Difficulty: Undergraduate/MBA

9B03E019

Business Intelligence Strategy at Canadian Tire

Nicole R.D. Haggerty; Darren Meister

Canadian Tire Corporation consists of five main business groups: a large retail chain providing automotive parts, sports and leisure and home products; a financial division; a petroleum division; a specialty automotive parts division; and a retailer of casual and work wear clothing. The information technology group is faced with developing an implementation plan for the development of a business intelligence infrastructure and business capability at Canadian Tire Retail. Concurrent to this initiative is the development and implementation of an information technology strategy for Canadian Tire Corporation, which places a number of programs on the priority list, with business intelligence seen as a high priority item for which the organization can score some quick win business success.

Publication Date: November 05, 2003
Discipline: Information Systems;
Issues: Information Systems; Business Intelligence; Knowledge Based Systems; Information System Design
Industry: Retail Trade;
Setting: Canada, Large organization, 2003
Difficulty: Undergraduate/MBA

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