Brief Cases

CHALLENGING, DATA-DRIVEN, SHORT

Brief Cases are rigorous and compact, with 5–8 narrative pages and 3–4 exhibits. Supplementary spreadsheets assist students with a quantitative analysis of the case. Instructor spreadsheets provide supporting data and editable calculations.

All Brief Cases include Teaching Notes that outline objectives and teaching plans.

Audio versions of more than 40 Brief Cases are now available. Students can opt to purchase the MP3 file when purchasing a Brief Case as part of a coursepack.

ACCOUNTING

Biovail Corporation: Revenue Recognition and FOB Sales Accounting
A major Canadian pharmaceutical company announces that it will miss its quarterly earnings target and blames much of the shortfall on a truck accident that occurred on the last day of the quarter. Students explore the challenges of revenue recognition and the enforcement role of the SEC.
[5 pages plus exhibits.] #4011

NEW! Danshui Plant No. 2
A plant in southern China has a contract to assemble 2.4 million Apple iPhones. Three months into the contract, the plant is operating at a loss. The plant manager analyzes the budget and considers whether changing from a static to a flexible budget can help uncover the performance problems.
[3 pages plus exhibits.] #913525

Depreciation at Delta Air Lines: The “Fresh Start”
An airline adopts fair value accounting as part of its “fresh start” emergence from bankruptcy and changes its approach to depreciating aircraft. This case introduces depreciation policy and explores the links between accounting policies and financial reporting choices.
[4 pages plus exhibits.] #4013

Lyons Document Storage Corporation: Bond Math
A manager must analyze the refunding of bonds issued in 2000, when interest rates were higher. Students explore the terms of a bond contract and must understand how to calculate the value of a financial security.
[3 pages plus exhibits.] #3215

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Brief Cases

Merrimack Tractors and Mowers: LiF0 or FIFO?
A manufacturing company expects to report lower earnings than it did the prior year, and the CFO proposes changing from LiF0 to FIFO to maintain earnings growth. However, the change would result in higher income taxes.
[3 pages plus exhibits.] #3217

The Talbots, Inc., and Its Subsidiaries: Accounting for Goodwill
A women’s retailer purchases a competitor. The transaction creates a large goodwill account along with accounts for other intangible assets. The case explores how goodwill originates, how it is measured, and how it is amortized or impaired.
[5 pages plus exhibits.] #3254

New! Hill Country Snack Food Co.
The CEO of a snack food company believes in maximizing shareholder value by maintaining large cash balances and funding new initiatives internally using equity finance over debt finance. As he approaches retirement, analysts and investors want the company to adopt a more aggressive capital structure.
[4 pages plus exhibits. Student and instructor spreadsheets available.] #913517

Jones Electrical Distribution
Despite several years of rapid sales growth and higher-than-expected profits, an electrical supply company experiences short-term cash shortages. The owner weighs the options for managing sales growth against additional financing needs.
[3 pages plus exhibits. Student and instructor spreadsheets available.] #4179

Midland Energy Resources, Inc.: Cost of Capital
The senior vice president of project finance for a global oil and gas company must determine the weighted average cost of capital (WACC) for the company as a whole and for each of its divisions.
[6 pages plus exhibits. Student and instructor spreadsheets available.] #4129

Monmouth, Inc.
A producer of engines and massive compressors for the natural gas industry considers whether to acquire a tool company. Students must choose an approach for valuing the company and consider how the offer should be structured and implemented.
[5 pages plus exhibits. Student and instructor spreadsheets available.] #4226

Groupe Ariel S.A.: Parity Conditions and Cross-Border Valuation
A global manufacturer considers investing in cost-saving equipment at a facility in Mexico. Corporate policy requires a discounted cash flow (DCF) and an estimate for the net present value (NPV) for capital expenditures in foreign markets.
[4 pages plus exhibits. Student and instructor spreadsheets available.] #4194

NEW! Heritage Doll
A midsize, privately owned domestic firm evaluates two investment alternatives. The case explores basic issues in capital budgeting and requires students to analyze financial information from competing capital budgeting projects.
[7 pages plus exhibits. Student and instructor spreadsheets available.] #4212

“This case is a good introduction to the financial analysis supporting capital budgeting decisions. It’s all there, from working out the annual cash flows to calculating terminal value to coming up with the projects’ NPVs and IRRs.”
-Review on the HBP for Educators web site

NEW! Pacific Grove Spice Company
A manufacturer and distributor of spices and seasonings uses debt to fund the necessary growth in assets to support sales. The company must present a plan to reduce the amount of interest-bearing debt on its balance sheet.
[6 pages plus exhibits. Student and instructor spreadsheets available.] #4366

Ceres Gardening Company: Funding Growth in Organic Products
A leading player in the organic gardening industry wants to increase market penetration by offering steep discounts and vendor financing to its retailers.
[6 pages plus exhibits. Student and instructor spreadsheets available.] #4040

Flash Memory, Inc.
A computer and electronic memory device firm must invest in new product development to stay competitive. The CFO needs to prepare plans for investing and financing over the next three years.
[5 pages plus exhibits. Student and instructor spreadsheets available.] #4017

Blaine Kitchenware: Capital Structure
In response to an unsolicited takeover bid, an appliance manufacturer contemplates using excess liquidity and additional borrowing to repurchase stock. The company must determine the effects of increasing leverage on the cost of capital, firm value, and share price.
[5 pages plus exhibits. Student and instructor spreadsheets available.] #4040

Mercury Athletic: Valuing the Opportunity
The head of business development at a footwear company considers an acquisition. Students perform a DCF valuation using weighted average cost of capital (WACC) and estimate the firm’s value.
[7 pages plus exhibits. Student and instructor spreadsheets available.] #4050

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[6 pages plus exhibits. Student and instructor spreadsheets available.] #4366

Hansson Private Label, Inc.: Evaluating an Investment in Expansion
A manufacturer of private-label personal care products must decide whether to expand manufacturing capacity. Students complete an analysis of the project, including the development of cash flow projections and net present value calculations.
[5 pages plus exhibits. Student and instructor spreadsheets available.] #4021
**NEW! Polar Sports, Inc.**
A fashion skiwear company generates more than 80% of sales between September and January and relies on seasonal production to respond promptly to customer orders. The VP of operations considers the costs and benefits of switching to level production.
[2 pages plus exhibits. Student and instructor spreadsheets available.] #913513

**Valuation of AirThread Connections**
A senior associate at a cable company must prepare a preliminary valuation for acquiring AirThread Connections, a regional cellular provider. This case can be used as a capstone valuation exercise for first-year MBA students in an introductory finance course.
[8 pages plus exhibits. Student and instructor spreadsheets available.] #4263

**NEW! Evergreen Natural Markets 2012**
Kathleen Norton, the CEO of a successful food retailer with a track record of growth through local acquisition, has her leadership skills tested when her company purchases seven stores outside of the home base.
[8 pages plus exhibits.] #4450

**NEW! Winfield Refuse Management: Raising Debt vs. Equity**
A small, publicly traded company specializing in nonhazardous waste management considers a major acquisition in the Midwestern U.S. The chief financial officer wants the company to reconsider a long-standing policy to avoid long-term debt and fund the acquisition through a bond issue.
[4 pages plus exhibits. Student spreadsheet available.] #913530

**HUMAN RESOURCES MANAGEMENT**

**NEW! Celeritas, Inc.: Leadership Challenges in a Fast-Growth Industry**
Celeritas is a leading data communications company in a highly competitive market. With sales suddenly declining, the CEO calls for an off-site meeting to address problems he believes are causing the recent slide.
[8 pages plus exhibits.] #4436

**GENERAL MANAGEMENT**

**A Day in the Life of Alex Sander: Driving in the Fast Lane at Landon Care Products**
A new product manager at a cosmetics firm has drive and talent but also an intolerant style that alienates fellow employees. A supervisor hopes a 360° performance review can help.
[5 pages plus exhibits.] #2377

“This case is excellent for exploring gender assumptions, in addition to talking about working with and supervising a headstrong, egocentric employee. The in-class revelation always produces interesting reactions.”

~Review on the HBP for Educators web site*

**Applied Research Technologies, Inc.: Global Innovation’s Challenges**
A unit manager at a diversified technology company must decide whether to request $2 million in project funding from the division VP. Meanwhile, the VP must decide whether to shut down the unit.
[8 pages plus exhibits.] #4168

**Calveta Dining Services, Inc.: A Recipe for Growth?**
The company founder’s son has a directive from his father to double revenue within five years—but he must also maintain Calveta’s distinctive pro-employee culture.
[9 pages plus exhibits.] #4261

**Clayton Industries: Peter Arnell, Country Manager for Italy**
The country manager of a U.S.-based HVAC company must solve a range of problems that go against the firm’s strategic plans. Constraints include a depressed economy, difficult union relations, rising materials prices, and intense competition.
[7 pages plus exhibits. Student and instructor spreadsheets available.] #4199

*Reviews available to Premium Educators
**NEW! Raleigh & Rosse: Measures to Motivate Exceptional Service**

U.S. luxury goods retailer Raleigh & Rosse is sued by its employees for encouraging "off the clock" hours. At the center of the lawsuit is the famous Raleigh & Rosse performance measurement system previously thought to be the core of the retailer’s success.

[8 pages plus exhibits.] #4353

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**NEW! Bella Healthcare India**

Bella Healthcare India has evolved from a manufacturing facility of cardiology equipment into its own research and development center. After a failed joint product development effort with its parent company in the U.S., is the Bella Bangalore team ready to launch a new product specifically for the Indian market?

[10 pages plus exhibits. Student spreadsheet available.] #4440

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**NEW! Kent Chemical: Organizing for International Growth**

With a global expansion strategy in place, the president of Kent Chemical International proposes a third reorganization effort after two failed attempts to better align his business with its U.S.-based parent company.

[8 pages plus exhibits.] #4409

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**NEW! Levendary Cafe: The China Challenge**

Levendary Cafe has grown from a small restaurant into a $10 billion business with international expansion plans. Its new CEO, Mia Foster, must prove herself—and her first order of business is to address concerns about the Levendary China expansion plan.

[10 pages plus exhibits.] #4357

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**NEW! Meli Marine**

An inter-Asian container shipping company faces an important strategic decision after an acquisition opportunity presents itself—if the board purchases larger ships, should the company enter the global Asian-North American shipping business?

[7 pages plus exhibits. Student and instructor spreadsheets available.] #4426

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**United Cereal: Lora Brill’s Eurobrand Challenge**

A division VP for a multinational breakfast foods company must decide whether to make a new cereal the first branded cereal product for the European division and how to create an organizational structure to support the new product strategy.

[7 pages plus exhibits.] #4269

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**Atlantic Computer: A Bundle of Pricing Options**

A leading player in the high-end server market develops a software tool that allows its new server to perform four times faster. How should the firm price the new product bundle?

[7 pages plus exhibits.] #2078

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**Classic Knitwear and Guardian: A Perfect Fit?**

The CMO of a private-label, non-fashion knitwear manufacturer considers partnering with another company to produce a new line of high-margin, insect-repellent clothing.

[6 pages plus exhibits. Student and instructor spreadsheets available.] #4217

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**Clean Edge Razor: Splitting Hairs in Product Positioning**

A product manager struggles to position a new razor either as a "niche" high-end razor or as a razor for the average consumer.

[7 pages plus exhibits. Student and instructor spreadsheets available.] #4249

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**Cottle-Taylor: Expanding the Oral Care Group in India**

The director for oral care products in India develops a marketing plan for 20% growth in India—but her boss wants 30% growth. The new plan must factor in differences between rural and urban consumers and the acceptance of modern dental standards across India.

[9 pages plus exhibits. Student and instructor spreadsheets available.] #4350

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**Culinary Cookware: Pondering Price Promotion**

Faced with ambiguous results from a price promotion, a cookware manufacturer must decide whether a new promotion will damage its premium brand or improve brand awareness and stimulate sales.

[6 pages plus exhibits.] #4057

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**The Fashion Channel: Market Segmentation**

The new senior vice president of marketing for The Fashion Channel is preparing to recommend a new market segmentation program.

[7 pages plus exhibits. Student spreadsheet available.] #2075

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**Flare Fragrances Company, Inc.: Analyzing Growth Opportunities**

A perfume manufacturer with decreasing sales growth considers introducing a new line of perfume or expanding distribution.

[7 pages plus exhibits. Student and instructor spreadsheets available.] #4550

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**Giant Consumer Products: The Sales Promotion Resource Allocation Decision**

In an effort to boost sagging sales, the frozen food division of a consumer product company undertakes a risky trade promotion. Students analyze data on past promotions and consider the risks and returns of the new promotion.

[7 pages plus exhibits. Student and instructor spreadsheets available.] #4131

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Harrington Collection: Sizing Up the Activewear Market
In the wake of slumping sales and sagging profit margins, a leading manufacturer and retailer of high-end women’s apparel must decide whether to expand into the high-growth activewear market. [7 pages plus exhibits] #3258

Manchester Products: A Brand Transition Challenge
A furniture company acquires a powerful brand but can use the name for only three years. The VP of marketing must transition the power of the new brand back to the company. [7 pages plus exhibits] #4043

MedNet.com Confronts “Clickthrough” Competition
A web site that provides free health information relies on advertising sales. The company creates a strong case for achieving better results by advertising on “niche” web sites instead. [8 pages plus exhibits] #2066

Metabical: Positioning and Communications Strategy for a New Weight-Loss Drug
The marketing director at a pharmaceutical company must consider the strategy for launching a new weight-loss drug. Poor positioning in the competitive market could spell disaster. [7 pages plus exhibits] #4240

Metabical: Pricing, Packaging, and Demand Forecasting Recommendations for a New Weight-Loss Drug
The marketing manager prepares to launch a new weight-loss drug and must select the optimal packaging size for a typical course of treatment, determine pricing, and develop demand forecasts. [7 pages plus exhibits] #4183

Mountain Man Brewing Company: Bringing the Brand to Light
A brewing company brews just one beer, popular among blue-collar workers. Faced with declining sales, the CEO considers launching a light beer to attract younger drinkers. [7 pages plus exhibits; Student spreadsheet available] #2069

Natureview Farm
A Vermont-based organic yogurt is the leading brand sold into natural foods stores. The VP of marketing must decide whether to expand into the supermarket channel. [9 pages plus exhibits; Student spreadsheet available] #2073

“Natureview Farms is a well written, compact case. It is precise and enables me to deliver multiple objectives for my session, like trade margins, channel choice, channel conflict etc. Students who have worked with this case have given it a good review.”
—Review on the HBP for Educators web site

NEW! P.V. Technologies, Inc.: Were They Asleep at the Switch?
A leading manufacturer of photovoltaic inverters used in solar energy technology receives a bad evaluation from its largest customer. The company must consider the consequences to its reputation while considering four possible responses to the situation. [9 pages plus exhibits; Student and instructor spreadsheets available] #913505

Reed Supermarkets: A New Wave of Competitors
The VP of marketing at a high-end supermarket chain must decide how to meet challenging corporate targets. Options include retreating from price competition and focusing on quality or embracing private-label brands and competing aggressively on price. Contains an optional quantitative assignment. [11 pages; Student and instructor spreadsheets available] #4297

Reliance Baking Soda: Optimizing Promotional Spending
The new domestic brand director for an old and established product must create a marketing budget that delivers a profit increase of 10%. Students weigh the value of advertising and the benefits of a price increase for a mature brand. [6 pages plus exhibits] #4127

“Reliance Baking Soda is a very teachable case for both undergraduate and graduate students. It is a classic problem in product marketing—how to boost sales of a mature, rather boring product that doesn’t generate a lot of excitement. It’s a great exercise for students—MBA students get it because they usually have had the experience, and it’s a learning tool for undergraduates—not every product they are going to work on will be exciting.”
—Review on the HBP for Educators web site

Rosewood Hotels and Resorts: Branding to Increase Customer Profitability and Lifetime Value
A small firm runs 12 individually branded luxury properties. New leadership considers whether the firm should emphasize the corporate identity and make Rosewood a corporate brand. [6 pages plus exhibits; Student spreadsheet available] #2087

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BRIEF CASES

Saxonville Sausage
The leading product lines at a sausage manufacturer are all experiencing declining revenues, with the exception of an Italian sausage product. A marketing manager takes carefully sequenced steps to determine the product’s positioning.
7 pages plus exhibits. #2085

Soren Chemical: Why Is the New Pool Product Sinking?
A chemical firm launches a water clarifier for residential swimming pools and is surprised by poor sales. The marketing manager suspects the go-to-market strategy may have been flawed.
7 pages plus exhibits. Student and instructor spreadsheets available. #4188

The Springfield Nor’easters: Maximizing Revenues in the Minor Leagues
The marketing director of a new minor league baseball team must interpret survey research to determine optimal ticket pricing to boost attendance and help break even in the first year.
7 pages plus exhibits. #2510

TruEarth Healthy Foods: Market Research for a New Product Introduction
A healthy-foods company wants to build on its successful whole-grain pasta by introducing a similar concept for pizza. Students must decide whether to bring the new product to market.
7 pages plus exhibits. Student spreadsheet available. #4065

OPERATIONS MANAGEMENT

NEW! Bayonne Packaging, Inc.
A printer and paper converter specializes in delivering innovative packaging solutions for its customers. Despite tripling sales, the firm posted its first loss in more than 10 years. The VP of operations must analyze the production process and recommend improvements.
8 pages plus exhibits. Student and instructor spreadsheets available. #4420

NEW! Bergerac Systems: The Challenge of Backward Integration
A manufacturer of veterinary diagnostic instruments relies on two suppliers for the plastic cartridges used in a range of blood chemistry tests. The CEO, concerned about inconsistent deliveries, considers acquiring one of the suppliers or expanding existing capacity.
5 pages plus exhibits. Student and instructor spreadsheets available. #4381

FoldRite Furniture Company: Planning to Meet a Surge in Demand
A furniture company improves manufacturing quality and efficiency by developing stylish, environmentally friendly products. A new plan is needed to meet demand, control costs, and mitigate risk.
8 pages plus exhibits. Student and instructor spreadsheets available. #4555

The Morrison Company
A developer and manufacturer of radio frequency identification tags (RFIDs) experiences a dramatic increase in sales. The increase exacerbates existing manufacturing problems and leads to shipping delays and inadequate inventory on hand.
7 pages plus exhibits. Student and instructor spreadsheets available. #4564

Scientific Glass Incorporated: Inventory Management
Excess inventory at a glass manufacturer is tying up capital needed to fund the company’s expansion. The inventory manager must develop a more effective strategy.
8 pages plus exhibits. Student and instructor spreadsheets available. #4205

ORGANIZATIONAL BEHAVIOR

NEW! BoldFlash
A manufacturer of flash memory devices misses a new product development opportunity when groups in the mobile division refuse to work together. A new leader makes a number of organizational changes to improve the product development process, but there are signs that the changes didn’t go far enough.
8 pages plus exhibits. #4438

Campbell and Bailyn’s Boston Office: Managing the Reorganization
The regional sales manager at a securities brokerage firm reorganizes his generalist salespeople to increase sales of specialized, higher-margin products. Can the organization still respond to external changes in the securities industry?
7 pages plus exhibits. #2182

Engstrom Auto Mirror Plant: Motivating Through Good and Bad Times
Following a large-scale layoff, a supplier of automotive mirrors combats low morale and productivity by adopting an incentive plan. Several years later the plan stops producing payouts and the plant manager must consider revising it.
6 pages plus exhibits. #2175

Jamie Turner at MLI, Inc.
Set in an industrial lighting company, this Brief Case describes the evolution of an interpersonal mismatch between a previously successful manager, Jamie Turner, and his new boss.
9 pages plus exhibits. #4254

NEW! Johannes Linden: Managing the Global Executive Committee
In the wake of an unexpected drop in manufacturing costs, the director of a large Swiss appliance manufacturer must convince his global executive committee to revise revenue forecasts and sales targets for the upcoming year.
9 pages plus exhibits. #913509

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Audio Version Available
Martha Rinaldi: Should She Stay or Should She Go?
Martha Rinaldi, an assistant product manager at Potomac Waters, a leading beverage company, is frustrated by her relationships with her boss and a coworker. She considers returning to a previous employer. This case explores the challenges of building power and credibility in a new job and managing relationships with superiors.

[10 pages.] #4310

MediSys Corp.: The IntensCare Product Development Team
A medical equipment maker develops an innovative system for monitoring intensive care patients. The development team struggles with design, its production schedule, and a competitive threat.
[7 pages plus exhibits.] #4059

“The case illustrates how interpersonal and strategic issues are intertwined and how addressing each in isolation at best only solves half the problem. My more experienced students identify with the issues in the case. The less experienced students are sometimes surprised to see how dysfunctional teams can be. The teaching note is very useful.”
-Review on the HBP for Educators web site*

RL Wolfe: Implementing Self-Directed Teams
A plastic pipe manufacturer introduces self-directed teams. Three years later, the plant outperforms the firm’s other plants and the production director seeks to understand why.
[6 pages plus exhibits.] #4063

Stone Finch, Inc.: Young Division, Old Division
To stimulate innovation and growth within a new division, an aggressive CEO milks the firm’s cash cow, an old manufacturing unit. The old unit soon faces key employee departures and sinking morale, and the newer unit runs into similar difficulties.
[7 pages plus exhibits. Student spreadsheet available.] #3214

TerraCog Global Positioning Systems: Conflict and Communication on Project Aerial
A high-tech firm that develops consumer GPS products is surprised by a competitor’s innovative product. The firm pursues development of a competing product, but cost projections threaten to scuttle the project.
[6 pages plus exhibits.] #2184

Thomas Green: Power, Office Politics, and a Career in Crisis
A promising young marketing manager must resolve a deepening conflict with his boss. The employee was promoted rapidly but fails to understand the demands and boundaries of the job.
[6 pages plus exhibits.] #2095

“My undergrads in a Leadership course get involved with this case discussion. The case seems to generate strong opinions about the principal characters, who should do what, and who should have done what … and why. Power, influence, career progression, managing up, political behaviors, leadership … all of these topics surface in this discussion. Recommended!”
-Review on the HBP for Educators web site*

Treadway Tire Company: Job Dissatisfaction and High Turnover at the Lima Plant
Management at a tire manufacturing company confronts job dissatisfaction and a high turnover rate among line foremen. The HR director must analyze the problem and provide an action plan.
[6 pages plus exhibits.] #2189

SALES

DBK: The Power of Direct Sales
The sales representatives at Designs by Kate sell private-label jewelry at hosted parties. They also recruit new sales reps. Sales have started to decline and the company must revisit the commission structure in order to determine whether it is still effective.
[7 pages plus exhibits. Student and instructor spreadsheets available.] #4284

NEW! Comfort Class Transport: Does Customer Service Need an Overhaul?
Customer satisfaction with the drivers at a limousine company is high and management plans to expand into new markets. However, underperformance in the customer service call center could threaten the company’s future.
[7 pages plus exhibits. Student and instructor spreadsheets available.] #4374

Playa Dorada Tennis Club: Expansion Strategy
A beach resort in Florida faces a growing seasonal demand for tennis services. The director of tennis operations analyzes court capacity and pricing structure as he considers plans for expansion.
[7 pages plus exhibits. Student and instructor spreadsheets available.] #4221

Porcini’s Pronto: Great Italian Food Without the Wait!
The management of an Italian restaurant chain considers launching a new chain of lower-cost restaurants. The vice president of marketing must analyze three expansion strategies: build and operate the new chain, create a franchise, or consider syndication.
[9 pages plus exhibits. Student and instructor spreadsheets available.] #4277

NEW! WrapItUp: Developing a New Compensation Plan
A restaurant chain based in California offers sandwiches made with fresh, healthy ingredients. Management pilots a profit-sharing program at two restaurants in order to address high employee turnover, decreasing customer satisfaction, and flat revenue growth.
[7 pages plus exhibits. Student spreadsheet available.] #4362

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