



## Overview

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## Biography of Jonathan H. Bari

### Education

- BA, University of Pennsylvania
- MBA, Columbia Business School

**Jonathan (Jon) H. Bari** has over 31 years of professional experience in the marketing and technology industries, including over 25 years working with and teaching about Internet businesses.

Mr. Bari is President of Bari Enterprises, Inc. d/b/a Bari Consulting Group which provides expert witness and consulting services to firms on: Internet history, e-commerce, social media, marketing, data breaches (including PCI Compliance), identity theft, digital identity, authentication, Internet strategies, information security, IPTV, middleware, software development, advertising, intellectual property, broadband/speed, user experience, online privacy and security, Internet crime, as well as strategic planning and business development.

Mr. Bari has also served as the Founder and President of The Constitutional Walking Tour of Philadelphia since 2003. Additionally, Mr. Bari serves as an Adjunct Instructor of Business at Temple University's Fox School of Business where he has taught strategic planning on a part-time basis since Spring 2004.

Mr. Bari's thought leadership and expertise in various matters, including in social media, e-commerce, the Internet, identity theft, digital identity, and online privacy and security have been honed through his work on various matters dating back to 1996 including:

- Retained in civil litigation cases involving various Plaintiffs and Defendants including: Amazon, Apple, Citigroup, eBay, Facebook, Go Daddy, Google, H&R Block, Infomir, JPMorgan Chase, Micros Retail Systems, Micros Systems, New York Angels, Pinterest, Regents of the University of California, Research in Motion, Samsung, State of Delaware, State of New Jersey, Sun Microsystems, Thomson Reuters, Versata Software, and Yahoo!, etc.
- Invented United States Patent entitled, "Method and system for secure registration, storage, management and linkage of personal authentication credentials data over a network." United States Patent Number 7,155,739, filed on January 14, 2000 and issued on December 26, 2006 (principal inventor of U.S. Patent 7,155,739, and corresponding international patent issued in

### Bari Consulting Group

Israel, Patent #150728). Sold IP Portfolio to VeriSign.<sup>1</sup> Provided consulting services to VeriSign regarding its IP Portfolio acquisition and VeriSign's online identification and authentication cloud initiative.

- Invented United States Patent, "A Method and System for Quantifying and Qualifying Athletic Skills and Competitive Results in a Social Network". U.S. Patent Number 10,248,729, filed on May 28, 2014 and issued on April 2, 2019.
- Served as a Judge, Be Your Own Boss Bowl Competition (Business Plan Competition), one of the nation's most lucrative pitch competitions for aspiring entrepreneurs, developed by the Innovation and Entrepreneurship Institute at Temple University's Fox School of Business.
- Instructed students at Wharton's Leadership in the Business World summer programs.
- Served as one of the contributing authors to the first Specifications produced by the Liberty Alliance, the global identity consortium (which initially involved 42 companies including Mr. Bari's firm, Catavault, as well as American Express, AOL and Sun Microsystems) working to build a more trusted Internet for consumers, governments and businesses worldwide.
- Authored "Preventing Risk From Becoming Reality," June 2010.
- Provided testimony to the United States Senate Appropriations Committee on securing additional Federal funding for Celiac Disease research with the National Institutes of Health (NIH), June 2019.
- Organized and spoke at a bipartisan Congressional Briefing panel on "Securing Significant Federal Funding for Celiac Disease Research" hosted by Congressman Dwight Evans (D, PA-3) and Congressman John Joyce, M.D. (R, PA-13), January 2020.
- Invited to testify in front of the United States Senate Judiciary Committee on middleware, online identification and authentication as well as Internet competition, September 2001.
- Served as Founder, Chairman & CEO of PINvault.com Inc. d/b/a Catavault, a single sign-on security software firm that eliminated the need for multiple authentication credentials such as user names, PINs and passwords (Time Warner Cable was its largest client). Catavault was developed as an online "Fort Knox" that was never unlawfully and fully penetrated by any hackers, and Catavault protected its users' personal data with Secure Sockets Layer (SSL) technology which encrypted all communications between a user's Web browser and Catavault's servers. Errors and Omissions insurance was underwritten through a special policy with Lloyd's of London syndicates that utilized IBM Internet Emergency Response Service to audit the security of the Catavault network. Privacy certification was audited and certified by both BBBOnLine and TRUSTe. Catavault also employed a multiple-tiered architecture with redundant firewalls that prevented unlawful penetration by outside parties. Recruited and chaired a world-class Board of Directors including the: Former Chief Marketing Officer of The Coca-Cola Company; Retired President and CEO of Philip Morris USA; EVP & CFO of Cott Corp.; and Former Chairman and CEO of Razorfish.

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<sup>1</sup> Subsequent to VeriSign's acquisition of the IP Portfolio invented by Jonathan Bari, on August 9, 2010, Symantec Corp. (Nasdaq: SYMC) completed its acquisition of VeriSign's identity and authentication business ("VeriSign Authentication Services"). VeriSign Authentication Services provides solutions that allow companies and consumers to engage in communications and commerce online with confidence. With more than one million web servers using VeriSign's SSL certificates, an infrastructure that processes more than two billion certificate checks daily, and a logo that is seen up to 650 million times a day, the VeriSign seal is the most recognized symbol of trust on the Internet. Sources: <http://www.verisign.com/corporate/index.html?tid=footer> (accessed on June 1, 2011) and [http://www.symantec.com/about/news/release/article.jsp?prid=20100809\\_01](http://www.symantec.com/about/news/release/article.jsp?prid=20100809_01) (accessed on July 27, 2012).

- Met with officials of the U.S. Government’s E-Authentication Gateway Team on several occasions about their common authentication service and single sign-on capability initiatives across all Federal e-Government services; responded to the United States General Services Administration’s (“GSA”) E-Authentication Initiative, Request for Information dated July 12, 2002, GSA RFI Number T02-ALD-001.
- Served as a member of the Computer & Communications Industry Association (CCIA), the leading industry advocate in promoting open, barrier-free competition in the offering of computer and communications products and services worldwide. Provided expert analysis on online identification and authentication and digital identity, specifically pertaining to industry and corporate strategies, software applications as well as privacy and security implications.
- Authored various work product documents and White Papers on Digital Identity including “Open Sesame White Paper - Online Identification & Authentication Federations” and “Catavault Technical White Paper”.
- Authored one of the 47 seminal Tunney Act comments regarding the United States v. Microsoft Antitrust Settlement; Catavault’s Comments were deemed as “major” by the United States Department of Justice. In total, there were 34,000 comments filed, but less than 0.1% were deemed as major.
- Authored Catavault’s Comments to the Federal Trade Commission “In the Matter of Microsoft Corporation on the Agreement Containing the Consent Order.”
- Retained by Yodlee, one of the world’s leading providers of trusted data aggregation solutions specializing in the financial services industry to develop new business opportunities with the U.S. Government.
- Served as Director, Business Development for Time Warner’s Road Runner High Speed Online and served on the launch team as an Analyst for Comcast Online Communications during the nascent days of the Internet revolution in the mid-late 1990s with regard to developing and marketing connectivity augmented by Content, Commerce, Communications and Community. Helped develop Road Runner v.2.0 in terms of user interface design, content acquisition and licensing from best of breed content providers (i.e., ABC News, A&E Television Networks, Bloomberg, CNN, CNET, Disney, E! Online, ESPN, HBO, MTV Networks, Nickelodeon, QVC, Warner Bros.) advertising sales business model, e-commerce deals with third party companies seeking to leverage broadband capabilities, etc. Helped develop Road Runner v.2.0 in terms of licensing and developing back-end technological infrastructure including user interface and functionality with Razorfish, content management system (“CMS”) from Vignette, database from Sybase, advertising serving and reporting from DoubleClick, search tools, personal home pages with Homecom, message boards with Modem Media, etc. Worked on the joint venture between Road Runner High Speed Online and US West’s MediaOne Express.<sup>2</sup>
- Developed The Constitutional Walking Tour App with OnCell.
- Partnered with McDonald’s to cross-promote The Constitutional Walking Tour of Philadelphia and Spirits of ’76 Ghost Tour with the McDonald’s in-store Entertainment Value Centers. Utilized McDonald’s Tray Toppers, Posters & Coupons, along with McDonald’s radio commercials to offer discounts for seasonally July 4<sup>th</sup> and Halloween tours with a portion of the proceeds from each ticket sold generating Ronald McDonald House Charities of Philadelphia.

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<sup>2</sup>“Road Runner, MediaOne join forces“, December 10, 1997, <https://www.cnet.com/news/road-runner-mediaone-join-forces/>, last accessed on November 18, 2020.

- Attended “Cybersecurity Incidence Response: Preparing for the Inevitable and Mitigating Litigation and Enforcement Issues” Webinar, Morgan Lewis.
- Attended “2020 Election Outcome: Telecom, Media, and Tech Impacts of the November 2020 Elections” Webinar, Morgan Lewis.
- Received media coverage for his work and/or provided commentary in various media properties including: ABC Radio Networks, BusinessWeek, CNBC, CNN, FOX News, Los Angeles Times, The New York Times, The Philadelphia Inquirer, Philadelphia Business Journal, 6ABC (Philadelphia), KYW Newsradio (Philadelphia), The San Jose Mercury News, The Seattle Times, USA Today, The Wall Street Journal, etc.
- Provided business consulting services to Five Below, a start-up retail concept that grew from one initial location to over 950 stores in 38 states; Five Below offers thousands of trend-right products for teens, as well as pre-teens and other value-minded, trend-conscious consumers, all of which are priced from \$1.00 to \$5.00. Developed Web site, grand opening marketing model including grand opening merchandising marketing materials that could be used to facilitate rapid growth of Five Below store locations across many states.
- Provided business consulting services to DoctorQuality, an online healthcare company, after its servers and its clients’ personal data were breached.
- Provided consulting services to: Bain & Company (tourism and hospitality non-profit – business development), Capsicum Group (legal services - business development), Comcast High Speed Internet - Comcast@Home (broadband Internet Service Provider - strategic planning, business development, content licensing, advertising sales), DoctorQuality (healthcare software - privacy and security, marketing), Eastern National (tourism and hospitality non-profit – business development), Five Below (retail – business development, marketing), The Franklin Institute Science Museum (museum – IT, business development, marketing – with LinuxForce), Independence Blue Cross (healthcare insurance – digital identity, single sign-on across applications – with LinuxForce), LinuxForce (IT services – marketing and business development), MostlyWeb (Web developer and graphic design – business development, marketing), Solution Media (Web site and application developer - strategic planning, marketing, business development), UAS (security services – strategic planning, business development, marketing), and Yodlee (software application provider – marketing and business development).
- Invited to participate in ongoing Leadership Pulse market research, Ross School of Business University of Michigan, Center for Effective Organizations at the Marshall School of Business, University of Southern California and eePulse, Inc., 2007-2011.
- Provides business consulting services to Universal Atlantic Systems, Inc. d/b/a UAS, a national provider of integrated security services which serves a diverse client base including food service providers, convenience stores and retailers.

Previously, Mr. Bari worked with various high profile companies in the following roles:

- Chairman & CEO - Catavault, a single sign-on security software firm that eliminated the need for multiple authentication credentials such as user names, PINs and passwords (Time Warner Cable was its largest client) – see above for additional information. 1999-2003
- Vice President, Business Development - MoreCom, a cable TV software concern in the Broadband Internet Over TV and Enhanced TV sector that offered consumer end user subscribers Broadband IP networking connectivity via a digital cable TV set-top box and a standard analog TV set (acquired by Liberate Technologies for approximately \$561 million). 1999.

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- Director, Business Development - Time Warner's Road Runner High Speed Online (Road Runner was spun off as a separate entity after receiving hundreds of millions of dollars in equity stake investments from the likes of Compaq). 1997-1999.
- Analyst and Business Development Consultant - Comcast Online Communications launch team (started when Comcast had 48 trial homes in Montgomery County, Pennsylvania, which evolved into Comcast High-Speed Internet/Xfinity Internet and the nation's largest broadband Internet service provider with over 30.1 million subscribers as of November 30, 2020)<sup>3</sup>. 1996-1997.
- Account Executive - EZ Communications/WIOQ-FM (Q102) in Philadelphia (clients included Anheuser-Busch, Coca-Cola and Sears). 1990-1995.
- College Marketing Representative - Capitol Records, EMI USA and Enigma Records: Promoted artists for air-play on college radio stations and coverage in college newspapers; developed merchandising point of sale displays at various music retailers (Tower Records, Sam Goody and indie record stores), and hosted meet and greets with artists at Philly-area concert venues. 1988-1989.
- Intern - U.S. Department of Commerce, International Trade Administration, Office of Textiles and Apparel, International Agreements and Monitoring Division. 1986.

### **Awards**

In 2005, Mr. Bari received the Philadelphia Business Journal's "40 Under 40" award which recognized Mr. Bari's labor of love with The Constitutional Walking Tour and honored "proven performers in their respective industries and communities."

### **Board of Directors & Volunteer Experience**

- Board of Directors, United States Tennis Association (USTA) Middle States Section. Chair, Audit Committee (organization has about approximate \$3.2 million in annual revenues and \$3.2 million in annual expenses, as well as about \$3.5 million in assets).
- Board of Directors, Legacy Youth Tennis and Education (formerly Arthur Ashe Youth Tennis and Education), a United States Tennis Association Certified Regional Training Center. Chair, Marketing Subcommittee; Search Committee - President and CEO; Development Committee; and Programming (tennis and education) Committee.
- Judge, Be Your Own Boss Bowl Competition (Business Plan Competition), Temple University's Fox School of Business
- Peer Chair to Anti-Defamation League's Glass Leadership Institute in Philadelphia.
- Advisory Board, Solution Media.
- Fellow, Irwin L. Gross eBusiness Institute<sup>4</sup> at Temple's Fox School of Business.
- National Advisory Board of DoctorQuality (acquired by Quantros in 2003).

### **Sample Speaking Engagements**

- Congressional Briefing – Securing Significant Federal Funding for Celiac Disease Research

<sup>3</sup> "Comcast Reports 3<sup>rd</sup> Quarter 2020 Results", October 29, 2020, <https://www.cmcsa.com/news-releases/news-release-details/comcast-reports-3rd-quarter-2020-results>, last accessed on December 6, 2020.

<sup>4</sup> The Irwin L. Gross eBusiness Institute (EBI) Fellows program recognized information technology and e-commerce leaders and provided a model for involving practitioners with The Fox School. The vision of the Fellows program was to create a simple structure so that IT leaders can interact with and contribute to the mission of the Fox School and specifically the information technology programs, students, and research activities.

- New Jersey Education Association – “American History Timeline Activity & Virtual Tour of Historic Philadelphia”
- Columbia Business School
- Temple University’s Fox School of Business
- University of Pennsylvania’s Wharton School - Leadership in the Business World
- The Press Club
- eTV World
- Friends of Independence National Historical Park
- Anti-Defamation League’s Board of Directors, Philadelphia
- The Constitutional Walking Tour of Philadelphia’s “Modern Day Constitutional Conventions”

### **Personal**

- Mr. Bari works and lives in Penn Valley, a Philadelphia suburb, along with his wife, Leslie, their daughter, Lexi, and son, Jax.
- Mr. Bari is an avid supporter of the Olympic Movement and its ideals, and he has enjoyed attending Summer and Winter Olympics to root for Team USA. Jon and his family were one of the five international winning families in the Olympic Families Tour Beijing blogging contest sponsored by The Beijing Organizing Committee for the Games of the XXIX Olympics (BOCOG) to help celebrate the one year countdown to the Beijing 2008 Olympics. Jon’s family blog about the Olympics was one of the top five international vote recipients in this worldwide contest.

### **Linkedin**

[www.linkedin.com/in/jonbari](http://www.linkedin.com/in/jonbari)

### **Bari Consulting Group**

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[www.BariConsulting.com](http://www.BariConsulting.com)



## Case Listings for Jonathan H. Bari

Jonathan Bari has performed consulting and expert witness work on various cases including:

Michael J. Diehl, Plaintiff, v. Brian P. Frazee and Douglas S. Friend, both individually and t/d/b/a VITALink, VITALink Telecommunications, Inc., VITALink Properties, LLC, VITALink, LLC, and QCOL, INC., Defendants; Somerset Court of Common Pleas, No. 393 Civil 2016. (Diehl v. Frazee, et al.)  
Retained By: Defendants (September 2020)

Joint Stock Company “Channel One Russia Worldwide,” Closed Joint Stock Company “CTC Network,” Joint Stock Company “TV DARIAL,” Closed Joint Stock Company “New Channel,” Limited Liability Company “Rain TV-Channel,” and Limited Liability “Company Comedy TV.” (“Plaintiffs”) v. INFOMIR LLC (www.infomirusa.com), INFOMIR GMBH, ALEXANDER MARAHOVSKY, EVGENI LEVITIN, TELECOMMUNICATIONS TECHNOLOGIES LTD., PANORAMA ALLIANCE, LP (www.mypanorama.tv), ASAF YEVDAYEV, DAVID ZELTSER, GOODZONE TV (www.gudzon.tv), MOIDOM LLC, TELEPROM, VDALI, MHCOM GmbH and John Does 1-50. (Defendants) (“Channel One, et al., v. Infomir et al.”), Case 1:16-cv-01318-GBD-BCM, United States District Court, Southern District of New York  
Retained By: Plaintiff (January 2020)  
Testified at Deposition (October 30, 2020)

LegalForce RAPC Worldwide, P.C., Plaintiff v. Matthew H. Swyers; TTC Business Solutions, LLC; The Trademark Company, LLC; The Trademark Company, PLLC, and Does 1-50, Inclusive, Defendants; Case 3:17-CV-07318-MMC, United States District Court, Northern District of California, San Francisco Division  
Retained By: Plaintiff (September 2019)

LegalForce RAPC Worldwide, P.C., Plaintiff v. Chris DeMassa d/b/a TMEXPRESS.COM & URGENTTRADEMARK.COM; and Does 1-50, Inclusive, Defendants; Case 3:18-CV-00043-MMC, United States District Court, Northern District of California, San Francisco Division  
Retained By: Plaintiff (September 2019)

LegalForce, Inc., a Delaware Corporation (“Legal Force”), Plaintiff v. LegalZoom.com. Inc., a Delaware Corporation (“LegalZoom”), Defendant, Case No. 3:18-cv-07274-MMC (United States District Court, Northern District of California)  
Retained By: Plaintiff (May 2019)

The Forensic Institute, LLC (“Forensic Institute”), Plaintiff vs. The University of Charleston, Inc. Civil Action #17-C-1641, (“University of Charleston”), Defendant, (“Forensic Institute v. University of Charleston”), (Circuit Court of Kanawha County, West Virginia, December 4, 2017)  
Retained By: Plaintiff (April 2019)

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Kay, Tabas, Niknam & DiDomenico Ophthalmology Associates, P.C. (“Kay, Tabas”) v. Gibraltar IT, PICS Case No. 15-1664 (C.P. Philadelphia Oct. 2, 2015) (“Kay, Tabas v. Gibraltar”), (Removed to Court of Common Pleas, Cumberland County, New Jersey)  
Retained By: Plaintiff (June 2018)

Commonwealth of Pennsylvania v. Kenneth Christopher Shepherd, Court of Common Pleas, Chester County, Pennsylvania, Criminal Action No. CR-4020-2016, OTN: T842710-1,  
Retained By: Defendant (March 2017)

John Wells (Plaintiff) v. State of Delaware, and The Office of the Delaware State Fire Marshall [sic], and Detective Michael Spadea, Individually and as a detective for the Office of the Delaware State Fire Marshall [sic] (Defendants); United States District Court for the District of Delaware, Civil Action No. Civil Action No.1:15-cv-00642.  
Retained By: Defendants (May 2016)

Theodore Schroeder, Rendezvoo LLC, Skoop Media Associates Inc. v. Pinterest, Inc., Brian S. Cohen, New York Angels Inc., Supreme Court of the State of New York, County of New York, Index No. 652183/2013.

Retained By: Plaintiffs (February 2016)  
Testified at Deposition (August 2-3, 2016)

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Bravo Development Group, LLC d/b/a A Lighter Me (“Bravo”) (“Plaintiff”) v. Shahram Elli aka Ron Elli, an individual d/b/a Sourcis; Sourcis, Inc. (collectively “Sourcis”) (“Defendants”) (“Bravo v. Sourcis”); Superior Court of the State of California in and for the County of Sacramento, Case No.: 34-2012-00133552.

Retained By: Defendant (September 2014)  
Testified at Deposition (August 7, 2015) and testified at Trial (October 29, 2015)

Ogletree, Abbott, Clay & Reed Law Firm, LLP (Plaintiff) vs. Findlaw, an assumed name, West Publishing Corporation, a Minnesota Corporation, and Thomson Reuters Holdings Inc., a Delaware Corporation (Defendants); United States District Court, District of Minnesota, Civil No.: 0:14-CV-0340-RHK-TNL.

Retained By: Plaintiff (November 2013)

Ogletree, Abbott, Clay & Reed Law Firm, L.L.P. (“Plaintiff”) vs. Findlaw, Inc. and Brian Vogel (“Defendants”), 152<sup>nd</sup> Judicial District of Harris County, Texas; Case Number 2013-59869; October 7, 2013.

Retained By: Plaintiff (November 2013)

State of New Jersey vs. [male juvenile name], Juvenile Delinquency, Superior Court of New Jersey, Chancery Division, Family Part, County of Atlantic, Violation: 2C:20-25b, Computer Criminal Activity, Degree 2<sup>nd</sup> and Violation: 2C:17-3 and Criminal Mischief, Degree 3<sup>rd</sup>, October 31, 2013.

Retained on Behalf of: Defendant (November 2013)

Summit 6 LLC (Plaintiff) vs. Research in Motion Corporation, Research in Motion Limited, Samsung Electronics Co. Ltd., Samsung Telecommunications America LLC, Multiply, Inc., Facebook, Inc., and Photobucket Corporation (Defendants), Texas - United States District Court

**Bari Consulting Group**



for the Northern District of Texas, Dallas Division, Civil Action No. 3:11-CV-367; February 23, 2011<sup>5</sup>

Retained By: Plaintiff (March 2012)

Testified at Deposition (November 29, 2012)

Versata Software, Inc., f/k/a Trilogy Software Inc.; and Versata Development Group, Inc., f/k/a Trilogy Development Group, Inc. (“Plaintiffs”) vs. Internet Brands, Inc. f/k/a Carsdirect.com, Inc., Autodata Solutions Company, and Autodata Solutions, Inc. (“Defendants”);

Texas - United States District Court for the Eastern District of Texas, Marshall Division, Civil Action No. 2:08-cv-313 TJW; August 25, 2008 (first amended complaint)

Retained By: Plaintiffs (August 2011)

Eolas Technologies Incorporated and The Regents of the University of California (Plaintiffs) vs. Adobe Systems Inc., Amazon.com, Inc., Apple Inc., Argosy Publishing, Inc., Blockbuster Inc., CDW Corp., Citigroup Inc., eBay Inc., Frito-Lay, Inc., The Go Daddy Group, Inc., Google Inc., J.C. Penney Company, Inc., JPMorgan, Chase & Co., New Frontier Media, Inc., Office Depot, Inc., Perot Systems Corp., Playboy Enterprises International, Inc., Rent-A-Center, Inc., Staples, Inc., Sun Microsystems Inc., Texas Instruments Inc., Yahoo! Inc., and YouTube, LLC

(Defendants)<sup>6</sup>

Texas: United States District Court for the Eastern District of Texas, Civil Action No. 6:09-cv-446 (October 6, 2009)

Retained By: Plaintiffs (May 2011)

Testified at Deposition (January 10, 2012)

Faber, Coe & Gregg, Inc. and Faber, Coe & Gregg of Pennsylvania, Inc. (Plaintiffs) vs. Micros Retail Systems, Inc. and Micros Systems, Inc. (Defendants);

New Jersey: Superior Court of New Jersey, Hudson County, Civil Division #6, Docket No. L-766-10, Filed - February 4, 2010

New Jersey

April 2011

Retained By: Defendants

Louis F. DiSciullo (Plaintiff) vs. D’Ambrosio Dodge, Inc. t/a Jeff D’Ambrosio’s Dodge (Defendant)

Pennsylvania: United States District Court for the Eastern District of Pennsylvania, Civil Action No: 06-1775

2006

Retained By: Defendant (November 2007)

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<sup>5</sup> Defendant Facebook filed a Daubert Motion to strike the report and testimony of Jonathan Bari, however Facebook settled its litigation prior to a ruling by the Court.

<sup>6</sup> Defendants filed a Daubert Motion to strike the report and testimony of Jonathan Bari, and the Court denied that Daubert Motion in January 2012.

Sheran Ferrero (Plaintiff) vs. D'Ambrosio Dodge, Inc. t/a Jeff D'Ambrosio's Dodge  
(Defendant)<sup>7</sup>  
Pennsylvania  
2006  
Retained By: Defendant (November 2007)

Robert F. McCall (Plaintiff) vs. D'Ambrosio Dodge, Inc. t/a Jeff D'Ambrosio's Dodge  
(Defendant)<sup>8</sup>  
Pennsylvania  
2006  
Retained By: Defendant (November 2007)

National Community Pharmacists Association (Plaintiff) vs. Strategic Domain, Inc. (Defendant)  
Virginia: United States District Court for the Eastern District of Virginia, Alexandria Division,  
Civil Action No: 1:2007CV1152  
November 2007  
Retained By: Plaintiff (February 2008)

Strategic Domain, Inc. (Plaintiff) vs. National Community Pharmacists Association (Defendant)  
Counterclaim  
Virginia: Associated with case pending in the United States District Court for the Eastern District  
of Virginia, Alexandria Division, Civil Action No: 1:2007CV1152  
December 2007  
Retained By: Defendant (February 2008)

Angela Merrow (Claimant) vs. H&R Block Tax Services, Inc. (Respondent)  
Michigan: American Arbitration Association, Case No. 54 420 00729 08  
June 2008  
Retained By: Respondent (July 2008)

Jennifer Tomaszewski (Claimant) vs. H&R Block Tax Services, Inc. (Respondent)  
Michigan: American Arbitration Association, Case No. 54 420 00730 08  
June 2008  
Retained By: Respondent (July 2008)

Jerry Stacy, Emily Stacy, Theresa Anders, Aja Smallwood, Cynthia Tluczek (Plaintiffs) vs. H&R  
Block Tax Services, Inc. (Defendant)  
Michigan: Civil Action No. 07-CV-13327, United States District Court for the Eastern District of  
Michigan, Southern Division  
July 2007

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<sup>7</sup> Subsequently consolidated with Louis F. DiSciullo, et al., (Plaintiffs) vs. D'Ambrosio Dodge, Inc. t/a Jeff D'Ambrosio's Dodge (Defendant); United States District Court for the Eastern District of Pennsylvania, Civil Action No: 06-1775.

<sup>8</sup> Subsequently consolidated with Louis F. DiSciullo, et al., (Plaintiffs) vs. D'Ambrosio Dodge, Inc. t/a Jeff D'Ambrosio's Dodge (Defendant); United States District Court for the Eastern District of Pennsylvania, Civil Action No: 06-1775.

Retained by Defendant (July 2008)<sup>9</sup>

United States of America (Plaintiff) vs. Neal D. Saferstein, Tyrone L. Barr and Billy D. Light  
(Defendants)

Pennsylvania: United States District Court for the Eastern District of Pennsylvania

Criminal Case No: O7-CR-557

September 2007

Retained by Defendant Saferstein (November 2008)

Ron Brostrom vs. Wochok & Associates

Pennsylvania – Matter was resolved/withdrawn prior to case filing

Retained By: Plaintiff (March 2010)

Universal Atlantic Systems, Inc. (Plaintiff) vs. Bret Schwartz (Defendant)

Pennsylvania

April 2007

Case settled

Retained By: Plaintiff

Updated: October 13, 2020

### **LinkedIn**

[www.linkedin.com/in/jonbari](http://www.linkedin.com/in/jonbari)

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<sup>9</sup> Due to the commonalities of circumstances with the cases cited above - Angela Merrow (Claimant) vs. H&R Block Tax Services, Inc. and Jennifer Tomaszewski (Claimant) vs. H&R Block Tax Services, Inc. – most of the consulting work that was performed was consolidated in these two named matters.



## Case Studies That Jonathan Bari Has Taught at Temple University

### Overview

From Spring 2004 to the present, Jonathan Bari has served as an Adjunct Instructor of Business at Temple University's Fox School of Business in Philadelphia, Pennsylvania where he has taught strategic planning on a part-time basis in two different upper level undergraduate classes for the Department of Strategic Management: BA 4101, Global Business Policies and BA 361W, Business Policies. In teaching these "capstone" courses, Mr. Bari utilizes the Harvard Business School Case Method, and he focuses on integrating his students' strategic planning learning across various disciplines including accounting, computer science, corporate governance, economics, finance, government relations, legal, marketing, management, operations, organizational behavior statistics. To that end, Mr. Bari instructs his courses using case studies featuring a variety of leading companies from various industries, non-profits and government organizations, many with a special focus on information technology.

In addition, Mr. Bari served as a Fellow in the Irwin L. Gross eBusiness Institute<sup>10</sup> at Temple's Fox School of Business from 2002 to 2004.

The following companies have been the subject of formal Case Studies that Mr. Bari has used in teaching his courses at Temple University, including: Amazon, Apple, Best Buy, The Coca-Cola Company, Comcast Corporation/NBC Universal, Craig's List, Dollar General, eBay, Etsy, Facebook, General Electric, Google, Kleiner Perkins, LegalZoom, Louis Vuitton, Mattel, McDonald's, Merck, Microsoft, National Football League, Netflix, Porsche, Samsung, Sirius XM, UPS, The Walt Disney Company, Xerox, and Yahoo!.

### Listing of All Case Studies Taught

"AES Corporation: Values, Culture, and Operating Practices at a Global Power Company", Arthur A. Thompson, Thompson-Strickland, 13<sup>th</sup> Edition, 2002.<sup>11</sup>

"Airborne Express", Jan W. Rivkin, Harvard Business School Case Study, Revised May 23, 2007, Product Number: 798070-PDF-ENG.<sup>12</sup>

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<sup>10</sup> The Irwin L. Gross eBusiness Institute (EBI) Fellows program recognized information technology and e-commerce leaders and provided a model for involving practitioners with The Fox School. The vision of the Fellows program was to create a simple structure so that IT leaders can interact with and contribute to the mission of the Fox School and specifically the information technology programs, students, and research activities.

<sup>11</sup> Case Description – "A fascinating global company run by executives with unconventional beliefs about how to manage and that also stress the importance of exercising social responsibility. Students have to wrestle with issues relating to decentralization, empowerment, team-based organization, incentive compensation, job security, and some controversial policies and practices. Strongly recommended for inclusion in your module on implementing and executing strategy."

Source: <http://create.mheducation.com/cases/index.html#preview>

<sup>12</sup> Case Description – "In the wake of a highly successful quarter, senior managers of Airborne Express, the third largest player in the express mail industry, review the firm's competitive position. Airborne has survived, and

“Amazon, Apple, Facebook, and Google”, John Deighton and Leora Kornfeld, Harvard Business School Case Study, Revised December 12, 2013, Product Number: 513060-PDF-ENG.<sup>13</sup>

“Amazon.com, 2016”, John R. Wells, Galen Danskin, Gabriel Ellsworth, Harvard Business School Case Study, Revised May 10, 2016, Product Number: 716402-PDF-ENG.<sup>14</sup>

“Amazon.com, 2018”, John R. Wells, Galen Danskin, Gabriel Ellsworth, Harvard Business School Case Study, Revised May 24, 2018, Product Number: 9-716-402.<sup>15</sup>

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recently prospered, in an industry with significant economies of scale even though it is much smaller than industry giants Federal Express and United Parcel Service. The case challenges students to understand Airborne’s unusual position. Detailed data allow students to analyze Airborne’s relative cost position, the fit among its activities, the differences between Airborne and its rivals, and the evolution of its industry. Using these analyses, students make recommendations concerning the firm’s pricing policy, its globalization efforts, and a partnership with a related company. Designed to be taught in a course on business-unit strategy.”

Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=43702&R=798070-PDF-ENG&conversationId=1249894](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=43702&R=798070-PDF-ENG&conversationId=1249894)

<sup>13</sup> Case Description – “Four businesses had, by 2012, grown to dominate the infrastructure that all firms rely on to reach online customers. Will the balance of power among the four persist, will one take command at the expense of the other three, or are all four more vulnerable than they seem to outside forces? What are the implications for the pace at which consumers go online? Amara’s Law claims that we tend to overestimate change in the short run, and underestimate it in the long run.”

Source: <https://cb.hbsp.harvard.edu/cbmp/product/513060-PDF-ENG>

<sup>14</sup> Case Description - “On January 28, 2016, Amazon announced record 2015 operating profits of \$2.2 billion on \$107 billion of sales, and the markets responded with cautious optimism. For years, founder and CEO Jeffrey Bezos had prioritized growth and investment in new business areas over profits, but pressure from analysts was mounting as growth was slowing and profits were failing to materialize. In 2014, Amazon had recorded a net loss of \$241 million on revenues of \$89 billion, in stark contrast to China’s leading Internet player Alibaba, which reported \$3.9 billion of net income on revenue of \$12.3 billion. While Alibaba was a third-party marketplace with no distribution or inventory holding, Amazon’s business model was more diverse. Amazon was primarily an online retail department store, offering a wide range of product categories, but it also maintained a significant third-party marketplace where it offered shipping, customer service, payment processing, and return services to independent retailers. Amazon also offered software and cloud storage services, online video streaming, and its own line of electronic hardware (mobile, e-reader, and smart television products). In addition, Amazon published books, hosted its own app store, funded video content development, and operated Amazon Prime, an annual membership program with a wide range of benefits. Indeed, Amazon’s activities overlapped with those of Apple, Google, eBay, Alibaba, and many other companies. Amazon provided little information on the profitability of its lines of business, many of which were believed to be unprofitable. Which businesses would drive Amazon’s future growth? Would the investments Amazon was making in market share eventually translate into profits? Or would another major competitor or business model replace Amazon? On a visit to the United States in June 2015, Jack Ma, chairman of Alibaba, stated, ‘We’re not coming here to compete.’ Could Amazon or its investors afford to believe him?”

Source: <https://cb.hbsp.harvard.edu/cbmp/product/716402-PDF-ENG>

<sup>15</sup> Case Description: “On January 28, 2016, Amazon announced record 2015 operating profits of \$2.2 billion on \$107 billion of sales, and the markets responded with cautious optimism. For years, founder and CEO Jeffrey Bezos had prioritized growth and investment in new business areas over profits, but pressure from analysts was mounting as growth was slowing and profits were failing to materialize. In 2014, Amazon had recorded a net loss of \$241 million on revenues of \$89 billion, in stark contrast to China’s leading Internet player Alibaba, which reported \$3.9 billion of net income on revenue of \$12.3 billion. While Alibaba was a third-party marketplace with no distribution or inventory holding, Amazon’s business model was more diverse. Amazon was primarily an online retail department store, offering a wide range of product categories, but it also maintained a significant third-party

“Amazon.com, 2019”, John R. Wells, Benjamin Weinstock, Galen Danskin, Gabriel Ellsworth, Harvard Business School Case Study, Revised May 24, 2018, Product Number: 9-716-402.<sup>16</sup>

“Apple Inc. in 2008”, David B. Yoffie and Michael Slind, Harvard Business School Case Study, Revised September 8, 2008, Product Number: 9-708-480.<sup>17</sup>

“Apple Inc. in 2010”, David B. Yoffie and Renee Kim, Harvard Business School Case Study, Revised March 21, 2011, Product Number: 9-710-467.<sup>18</sup>

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marketplace where it offered shipping, customer service, payment processing, and return services to independent retailers. Amazon also offered software and cloud storage services, online video streaming, and its own line of electronic hardware (mobile, e-reader, and smart television products). In addition, Amazon published books, hosted its own app store, funded video content development, and operated Amazon Prime, an annual membership program with a wide range of benefits. Indeed, Amazon's activities overlapped with those of Apple, Google, eBay, Alibaba, and many other companies. Amazon provided little information on the profitability of its lines of business, many of which were believed to be unprofitable. Which businesses would drive Amazon's future growth? Would the investments Amazon was making in market share eventually translate into profits? Or would another major competitor or business model replace Amazon? On a visit to the United States in June 2015, Jack Ma, chairman of Alibaba, stated, “We’re not coming here to compete.” Could Amazon or its investors afford to believe him?”  
Source: <https://hbsp.harvard.edu/product/716402-PDF-ENG?itemFindingMethod=Coursepacks>

<sup>16</sup> Case Description: “In January 2019, Amazon.com Inc (Amazon) became the most valuable company in the world, above Microsoft, Apple, and Alphabet (Google). Jeff Bezos, Amazon's founder and CEO was now the world's richest man. On January 31st, 2019, Amazon announced 2018 operating profits of \$12.4 billion, up from \$178 million in 2014, on sales of \$232 billion, up from \$89 billion four years earlier. The shareholders expressed their satisfaction, but not all were happy with Amazon's meteoric rise. Many traditional retailers in the United States were going bankrupt, while major competitors such as Walmart and Best Buy were forced to invest aggressively in online retailing to prevent their market share from eroding. Every retail sector appeared to be under threat, fueling anxieties that Amazon and America's other tech giants were becoming too big and powerful. In the United States, Amazon was drawing criticism from across the political spectrum, with calls for it to be broken up. Meanwhile, the European Union was also investigating its practices. Did Amazon's success threaten its very existence?”  
Source: <https://hbsp.harvard.edu/product/716402-PDF-ENG?itemFindingMethod=Coursepacks>

<sup>17</sup> Case Description – “In January 2007, three decades after its incorporation, Apple Computer shed the second word in its name and became Apple Inc. With that move, the company signaled a fundamental shift away from its historic status as a vendor of the Macintosh personal computer (PC) line. Mac sales remained vital to Apple’s future, but they now accounted for less than half of its total revenue. The company’s line of iPod media players, its iTunes online content store and its newly launched iPhone mobile handset business made up increasingly large shares of its operations. In early 2008, on the strength of sky-rocketing sales in those areas and by resurgent sales of Macintosh products, Apple’s revenues and its stock price reached record levels. The case explores the sustainability of Apple’s current business model, one that positioned the company simultaneously in the PC industry and the consumer electronics industry. While Apple enjoyed a high market share in digital media players and in online music sales, it remained a niche player in the worldwide PC industry. The case examines the history of Apple’s strategic moves under the leadership of CEOs Jobs, Sculley, Spindler, Amelio, and (again) Jobs; places those moves in the context of structural features of the evolving PC industry; and covers the iPod and iPhone businesses at considerable length.”  
Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=46631&R=708480-PDF-ENG&conversationId=1698669](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=46631&R=708480-PDF-ENG&conversationId=1698669)

<sup>18</sup> Case Description – “On April 4, 2010, Apple Inc. launched the iPad, the company’s third major innovation released over the last decade under its iconic CEO Steve Jobs. Apple’s strategy of shifting its business into non-PC products had thrived so far, driven by the smashing success of the iPod and the iPhone. Yet challenges abounded. Macintosh sales in the worldwide PC market still languished below 5%. Growth in iPod sales was slowing down.

“Apple Inc. in 2012”, David B. Yoffie and Penelope Rossano, Harvard Business School Case Study, Revised August 14, 2012, Product Number: 712490-PDF-ENG.<sup>19</sup>

“Apple Inc. in 2015”, David B. Yoffie and Eric Baldwin, Harvard Business School Case Study, Revised October 28, 2015, Product Number: 715456-PDF-ENG.<sup>20</sup>

“Asahi Breweries, Ltd.”, Malcolm S. Salter and Jiro Kokuryo, Harvard Business School Case Study, Revised October 12, 1994, Product Number: 389114-PDF-ENG.<sup>21</sup>

“Ben & Jerry’s – Japan”, James M. Hagen, Richard Ivey School of Business, August 10, 2010, Product Number: 9A99A037.<sup>22</sup>

iPhone faced increasing competition in the smartphone industry. And would Apple’s latest creation, the iPad, take the company to the next level?”

Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=2247161&R=710467-PDF-ENG&conversationId=1253025](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=2247161&R=710467-PDF-ENG&conversationId=1253025)

<sup>19</sup> Case Description – “On October 5, 2011, Steve Jobs tragically died of cancer. The recently retired CEO of Apple Inc. was a legend: he had changed Apple from a company near bankruptcy to one of the largest and most profitable companies in the world. Moreover, he had revolutionized several industries in the process, including music, phones, and computer tablets. This case explores Steve Jobs’ successes and the challenges facing his successor, Tim Cook. Could Cook continue to revitalize the Macintosh? With iPod sales declining for four straight years, would Cook be able to continue the iPhone’s dominance of smartphones in the face of growing competition from companies such as Google and Samsung? Would Apple’s newest creation, the iPad, continue to dominate the tablet market, or would the new competitors, ranging from Amazon to Samsung, steal, share and drive down profits? And could Apple thrive with Tim Cook rather than Steve Jobs at the helm?”

Source: <https://cb.hbsp.harvard.edu/cbmp/product/712490-PDF-ENG>

<sup>20</sup> Case Description – “At the end of 2014, Apple Inc. recorded the most profitable quarter of any firm in history, and its market capitalization soon topped \$700 billion. ‘Apple Inc in 2015’ explores the history of Apple, its successes under Jobs, its continued growth under Tim Cook, and the challenges facing the company in 2015. With iPod sales continuing their freefall, tablet sales in decline, and the Macintosh’s market share remaining small, Apple was increasingly dependent on the iPhone to drive its growth. Could Cook continue Apple’s dominance in the smartphone market in the face of growing competition? Could he revitalize the iPad business, become a leader in payments, with Apple Pay, and replicate Apple’s success in other device categories, such as the Apple Watch, the first new product the company had released since 2010?”

Source: <https://cb.hbsp.harvard.edu/cbmp/product/715456-PDF-ENG>

<sup>21</sup> Case Description – “Focuses on competitive repositioning, organizational renewal, and personal leadership. Describes how Asahi Breweries was faced with a major capacity expansion decision after succeeding in increasing market share dramatically in the traditionally stable Japanese beer industry. This has been done through the creation of a new product category, “Dry Beer.” Information on industry economics, Asahi’s organizational process, and competitive interaction are provided as well as an in-depth description of top management’s profile and management posture at Asahi. Designed to allow discussion on how to make a balanced decision incorporating such market strategy issues as product strategy, competitor retaliation, advertising policy, rebate policy, and distributor relations management, as well as such organizational elements as corporate goals, financial integrity, quality control, personnel policy, management philosophy, and leadership style.”

Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=21836&R=389114-PDF-ENG&conversationId=1253082](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=21836&R=389114-PDF-ENG&conversationId=1253082)

<sup>22</sup> Case Description: “The CEO of Ben & Jerry’s Homemade, Inc. needed to give sales and profits a serious boost; despite the company’s excellent brand equity, it was losing market share and struggling to make a profit. The company’s product was on store shelves in all U.S. states, but efforts to enter foreign markets had only been haphazard with non-U.S. sales accounting for just three per cent of total sales. The CEO needed to focus serious

“Best Buy in Crisis”, John R. Wells and Galen Danskin, Harvard Business School Case Study, June 30, 2012, Product Number: 9-713-403.<sup>23</sup>

“Be Our Guest, Inc.”, Dwight B. Crane and Penny Joseph, Harvard Business School Case Study, Revised March 2, 2001, Product Number: 299001-PDF-ENG.<sup>24</sup>

“Birds Eye and the U.K. Frozen Food Industry (A)”, David J. Collis and Robert M. Grant, Harvard Business School Case Study, Revised December 5, 1994, Product Number: 792074-PDF-ENG.<sup>25</sup>

“BMG Entertainment”, Jan W. Rivkin and Gerrit Meier, Harvard Business School Case Study, Revised September 22, 2005, Product Number: 9-701-003.<sup>26</sup>

attention on entering the world’s second largest ice cream market, Japan. An objective of Ben & Jerry’s was to use the excess manufacturing capacity it had in the U.S., and it found that exporting ice cream from Vermont to Japan was feasible from a logistics and cost perspective. The company identified two leading partnering options. One was to give a Japanese convenience store chain exclusive rights to the product for a limited time. The other was to give long-term rights for all sales of the product in Japan to a Japanese-American who would build the brand. For the company to enter Japan in time for the upcoming summer season, it would have to be through one of these two partnering arrangements.”

Source: <https://www.iveycases.com/ProductView.aspx?id=25519>

<sup>23</sup> Case Description: “In June 2012, Best Buy was in crisis. In 1996, Best Buy overtook Circuit City as the world’s leader in consumer electronics retailing; however, 18 years later, Best Buy now found this position threatened. With \$51 billion in revenues, it was still the biggest CE retailer, but sales were flat and profits had collapsed. Meanwhile, Amazon’s sales in Best Buy’s categories were growing at more than 50% p.a. and its total sales, at \$48 billion, were approaching those of Best Buy. As Wal-Mart cherry-picked popular items for steep discounts and Amazon encouraged consumers to compare prices using smart phones, Best Buy was becoming a showroom for lower cost retail models. International expansion was struggling and domestic sales of digital televisions were cooling. Although the popularity of mobile devices suggested easy growth, many devices were sold by telephone service providers, creating increased retail competition. To add to Best Buy’s problems, on April 10, 2012, CEO Brian Dunn resigned after an investigation into his personal conduct. On June 7, 2012, Dick Schulze, the firm’s founder, who had navigated the company through many strategic changes since 1966, also decided to leave and “explore all available options” for his 20.1% stake in the company. Best Buy had seen off many competitive challenges in the past. Would it be able to fend off these challengers and maintain its position?”

Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=4131220&R=713403-PDF-ENG&conversationId=1253533](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=4131220&R=713403-PDF-ENG&conversationId=1253533)

<sup>24</sup> Case Description: “Be Our Guest is a rapidly growing equipment rental company with substantial seasonality in its revenues and profits. In the spring of 1998, the senior management team is reviewing its financial plans in preparation for a meeting with the company’s bank. The case provides an opportunity to forecast financial needs and consider the appropriate structure and amount of bank borrowing.”

Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=14942&R=299001-PDF-ENG&conversationId=1253629](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=14942&R=299001-PDF-ENG&conversationId=1253629)

<sup>25</sup> Case Description: “Describes the forty-year evolution of the U.K. frozen food industry, and traces the emergence, dominance, and the decline of Birds Eye. Its success is as a vertically integrated producer, distributor, and marketer of frozen foods that pioneers the industry in the U.K. Its decline as other firms enter all stages of the value chain is seen as a result of its earlier success that yields it an unsustainable strategic position. Examines vertical integration as a strategy, the analytic rationale to be vertically integrated, and the disadvantages of vertical integration.”

Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=44055&R=792074-PDF-ENG&conversationId=1253854](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=44055&R=792074-PDF-ENG&conversationId=1253854)



“Burke- James Burke: A Career in American Business (B)”, Richard S. Tedlow and Wendy K. Smith, Harvard Business School Case Study, Revised October 20, 2005, Product Number: 9-390-030.<sup>27</sup>

“Callaway Golf Company: Sustaining Advantage in a Changing Industry”, John E. Gamble, Thompson-Gamble-Strickland, 2004.<sup>28</sup>

“Carmike Cinemas, Inc.: Industry and Company Perspectives”, Marilyn L. Taylor, North American Case Research Association, Spring 1992.<sup>29</sup>

“CDnow in the Online Music Business”, Alan B. Eisner and Nicole Belmont, Thompson-Strickland, 2001.<sup>30</sup>

“C.F. Martin and Company”, H. Donald Hopkins and Donna DeCarolus, North American Case Research Association, 1992.<sup>31</sup>

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<sup>26</sup> Case Description: “This case is accompanied by a Video Short that can be shown in class or included in a digital coursepack. Instructors should consider the timing of making the video available to students, as it may reveal key case details. As dramatic changes in technology and customer tastes roil the music industry, the top executives of BMG Entertainment, one of the world’s largest record companies, must decide how to organize for digital distribution of music. This case includes a brief history of the music industry, a description of the industry’s current structure and economics, and a description of digital downloading efforts.”  
Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=42878&R=701003-PDF-ENG&conversationId=1254048](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=42878&R=701003-PDF-ENG&conversationId=1254048)

<sup>27</sup> Case Description: “Covers the history of Tylenol from the autumn of 1982 through the second tampering incident in February 1986. Also deals with other developments in the history of Johnson & Johnson, especially the acquisition and divestiture of Technicare.”  
Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=20698&R=390030-PDF-ENG&conversationId=1254355](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=20698&R=390030-PDF-ENG&conversationId=1254355)

<sup>28</sup> Case Description: “This thoroughly updated case describes competition in the golf equipment industry and Callaway Golf’s strategy in building and sustaining competitive advantage in the industry. But the golf industry is now growing slowly and Callaway is running out of innovations to sustain its growth. Is the era of rapid growth over? What can Callaway do to rejuvenate its business? What strategic options make the most sense?”  
Source: <http://create.mheducation.com/cases/index.html#preview>

<sup>29</sup> Case Description: Four years after a leveraged buyout from Fuqua Industries, Carmike’s venture capitalists are ready to cash out. Chief Executive Officer Mike Patrick considers whether to go public or take on additional debt to satisfy the investors.”  
Source: <http://create.mheducation.com/cases/index.html#preview>

<sup>30</sup> Case Description: “This struggling e-tailer is in desperate need of a viable strategy and business model. The company is losing money and running low on cash to continue operations-it needs an infusion of capital quickly in order to survive, now that its merger with Columbia Record Club has been called off.”  
Source: <http://create.mheducation.com/cases/index.html#preview>

<sup>31</sup> Case Description: “This case studies Martin, the premier acoustic firm, as it adds new lines using Asian components and moves from possible bankruptcy to unprecedented success in the 1980s.”  
Source: <http://create.mheducation.com/cases/index.html#preview>

“Circuit City Stores, Inc. (A)”, William J. Bruns, Jr. and Susan Harmeling, Harvard Business School Case Study, Revised September 13, 2004, Product Number: 191086-PDF-ENG.<sup>32</sup>

“Coca-Cola on Facebook”, John Deighton and Leora Kornfeld, Harvard Business School Case Study, Revised December 5, 2012, Product Number: 9-511-110.<sup>33</sup>

“Coffee Wars in India: Café Coffee Day Takes On the Global Brands”, David B. Yoffie and Tanya , August 8, 2013, Product Number: 9-714-409.<sup>34</sup>

“Comcast Corporation”, Sunil Gupta, Henry W. McGee, Felix Oberholzer-Gee, and Margaret Rodriguez, 2016. Product Number: 715457-PDF-ENG.<sup>35</sup>

“Competition in the MP3 Player in Industry in 2005”, Jackson Marino, Thomas-Strickland-Gamble, 2007.<sup>36</sup>

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<sup>32</sup> Case Description: “Circuit City sells consumer electronic equipment, appliances, and extended service and warranty contracts which supplement those provided by equipment manufacturers. Equipment is sold at low margins, while warranties carry very high margins. A question has been raised about the proper method for recognizing revenues on the warranty portion of the combined sale. Deferring revenue will cut profit reported at the time of sales but may better match costs of warranty service.”

Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=6309&R=191086-PDF-ENG&conversationId=1255005](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=6309&R=191086-PDF-ENG&conversationId=1255005)

<sup>33</sup> Case Description: “In late 2008, executives at Coca-Cola had to decide what to do with a fan-created page on Facebook that had amassed over one million followers in three months. From a legal point of view the fan-created page was in violation of Facebook’s terms of service, because a non-copyright holder was using the imagery and logo associated with a known brand. Facebook contacted Michael Donnelly, Group Director, Worldwide Interactive Marketing for The Coca-Cola Company, to let him know that he was in the position to take down the hugely popular fan-created site or, conversely, he could take it over and make it an official marketing channel for the company. Coke was already revisiting its social media policies, with the Diet Coke and Mentos user-generated video incident fresh in its memory. Those videos, which featured elaborate geysers with Diet Coke as their main ingredient, were among the most viewed online videos at the time but were not initially sanctioned by the company. Donnelly knew that opening up the brand to creative consumers was necessary, but he and his team had to figure out how and to what extent they should do so while still protecting one of the world’s most valuable brands.” Source: <https://cb.hbsp.harvard.edu/cbmp/product/511110-PDF-ENG>

<sup>34</sup> Case Description: “Cafe Coffee Day (CCD) is contemplating how to respond to the entry of Starbucks into the Indian coffee chain market. The case study describes the emergence of CCD as the leading coffee chain in India, with over 1,400 cafes in India. In early 2013, Starbucks, the world’s leading coffee chain company, opened its first 11 outlets in India’s metropolitan cities with local giant, Tata, and promises of a national roll out. CCD management debated whether there was plenty of room for both Starbucks and CCD in India’s large growing market, or whether Starbucks’ entry required CCD to respond more assertively.” Source: <https://cb.hbsp.harvard.edu/cbmp/product/714409-PDF-ENG>

<sup>35</sup> Case Description: “In March 2015, the U.S. television industry received a major wake-up call. HBO, a premium cable channel with over 30 million subscribers, had announced it would begin offering a standalone streaming service. This new service would allow customers to bypass the cable companies and get direct access to HBO’s programming online. The announcement was followed closely by Brian Roberts, chief executive of the Comcast Corporation. Comcast was America’s largest cable and internet service provider, having built a profitable business bundling television content and delivering it via cable networks to more than 20 million households. Broadcast and cable television was a \$173 billion industry in the U.S., but the rise of on-demand and streaming services meant viewers had more options than ever before. What did developments such as HBO’s new service mean for the future of Comcast, and for the industry overall?” Source: <https://hbsp.harvard.edu/product/715457-PDF-ENG>

“Copperfield’s Books Inc.”, Armand Gilinsky and Tom Scott, Thompson-Strickland-Gamble, 2007.<sup>37</sup>

“Competition in the Bottled Water Industry”, Thompson et al, 2005.

“Coral Divers Resort”, Paul W. Beamish, Kent E. Neupert, and Andreas Schotter, Richard Ivey School of Business, July 18, 2008, Product Number: 9B08M041.<sup>38</sup>

“Crown Cork & Seal/CarnaudMetalbox”, William E. Fruhan and William Dewitt, Harvard School of Business Case Study, Revised September 2, 2003, Product Number: 296019-PDF-ENG.<sup>39</sup>

“Dansko, Inc.”, Amy C. Edmondson and Victoria W. Winston, Harvard School of Business Case Study, Revised October 25, 2006, Product Number: 606071-PDF-ENG.<sup>40</sup>

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<sup>36</sup> Case Description: “An excellent case for drilling students in analyzing competitive forces, driving forces, industry key success factors, and overall industry attractiveness. Action recommendations center on how Apple can defend its leading position with its iPod brand and what rivals can do to close the gap on iPod and seriously contend for market leadership. Accompanying video available.”

Source: <http://create.mheducation.com/cases/index.html#preview>

<sup>37</sup> Case Description: “Copperfield’s is a small entrepreneurial book retailer looking to expand its 6-store operation and carve out a bigger local market niche in head-on competition with such book retailers as Barnes & Noble, Borders, and others. Should it open another store in a location it is considering? Should one or more of its existing stores be closed? What competitive advantage should it strive to create? The case has exceptional data for students to evaluate in making their recommendations for action.”

Source: <http://create.mheducation.com/cases/index.html#preview>

<sup>38</sup> Case Description: “The owner of a small scuba diving operation in the Bahamas is reassessing his strategic direction in the light of declining revenues. Among the changes being considered are shark diving, family diving, exit, and shifting operations to another Caribbean location. These options are not easily combined, nor are they subtle. The case is intended to provide a work-out on the relationship between strategy, organization and performance, and how changes in strategy will dramatically affect the organization. The case also highlights the importance of understanding demographic changes as part of an environmental analysis.”

Source: <https://www.iveycases.com/ProductView.aspx?id=7341>

<sup>39</sup> Case Description: “A U.S. packaging firm acquires a French packaging firm with the objective of creating the largest global packaging firm in the world.”

Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=14335&R=296019-PDF-ENG&conversationId=1255604](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=14335&R=296019-PDF-ENG&conversationId=1255604)

<sup>40</sup> Case Description: “For the past 18 months, Mandy Cabot had worried that the shoe business she had built into a thriving operation with \$90 million in annual revenue and over 110 employees might instead be a “house of cards.” The management philosophy that had guided Dansko’s growth, ‘home schooling’ -- taking young energetic employees with little business experience and mentoring them--seemed ill-suited for the next phase of growth. Equally as precarious was the fact that with few exceptions, none of the senior management team had any prior experience in the footwear industry. So when a well-respected industry leader asked to talk about a merger, Cabot had to admit that with her ‘crisis of confidence,’ it might just be time.”

Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=37414&R=606071-PDF-ENG&conversationId=1255730](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=37414&R=606071-PDF-ENG&conversationId=1255730)

“Disney and Pixar: To Acquire or Not to Acquire?”, Juan Alcacer; David J. Collis; Mary Furey, Harvard School of Business Case Study, Revised: January 15, 2010, Product Number: 709462-PDF-ENG.<sup>41</sup>

“Dollar General (A) and (B)”, Willy Shih, Stephen P. Kaufman and Rebecca McKillican, Harvard School of Business Case Study, Revised November 4, 2019, Product Numbers: 607140-PDF-ENG and 607156-PDF-ENG.<sup>42</sup>

“Dollar General (A)”, Willy Shih, Stephen P. Kaufman and Rebecca McKillican, Harvard School of Business Case Study, Revised April 28, 2009, Product Number: 607140-PDF-ENG.<sup>43</sup>

“Ducati”, Giovanni Gavetti, Harvard Business School Case Study, Revised March 8, 2002, Product Number: 701132-PDF-ENG.<sup>44</sup>

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<sup>41</sup> Case Description: “Soon after Robert Iger took over as CEO of the Walt Disney Company in late 2005, he turned his attention toward Pixar, the animation studio with which Disney had worked since 1991 and was responsible for producing hits such as Toy Story and Finding Nemo. Disney’s own animated film business had been in decline since Jeffrey Katzenberg left to establish rival studio Dreamworks and the business relied on revenue from its partnership with Pixar to maintain performance. With the Co- Production Agreement between the two studios coming to a close in 2006, Pixar was looking to negotiate better terms with another distribution partner. Could Disney risk losing them?” Source: <https://cb.hbsp.harvard.edu/cbmp/product/709462-PDF-ENG>

<sup>42</sup> Case Description: “Dollar General Corporation (DG) operates one of the leading chains of extreme value retailers in the United States. 2006 revenues reached \$9.2 billion, making DG the 6th largest mass retailer in the country. With revenues growing at 9% annually over the five-year period up to 2005, DG had the distinction of being only one of three retailers to outperform Wal-Mart in both revenue and profit growth in that time. Life in a Dollar General store paints a vivid picture of the roots and historical focus of the company. Opportunistic buying has given the stores an eclectic merchandise mix. Analysts often referred to this category as “treasure hunt” SKUs. Offers an opportunity to examine a company’s business model, particularly since DG has been so successful competing with Wal-Mart where so many other retailers have not. While it started out as a family business in the five-and-dime tradition, it evolved to a close-out retail model where its unique low-overhead operations were advantageous. As it added highly consumable categories its mix shifted, but it managed to retain its low-overhead model. Interestingly, the mix shift was likely more an emergency strategy driven by store level operations than by top-down driven strategy. Frames the growth options available to DG’s CEO as he grapples with how to maintain growth.” Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=37642&R=607140-PDF-ENG&conversationId=1255800](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=37642&R=607140-PDF-ENG&conversationId=1255800)

<sup>43</sup> Case Description: “Dollar General Corporation (DG) operates one of the leading chains of extreme value retailers in the United States. 2006 revenues reached \$9.2 billion, making DG the 6th largest mass retailer in the country. With revenues growing at 9% annually over the five-year period up to 2005, DG had the distinction of being only one of three retailers to outperform Wal-Mart in both revenue and profit growth in that time. Life in a Dollar General store paints a vivid picture of the roots and historical focus of the company. Opportunistic buying has given the stores an eclectic merchandise mix. Analysts often referred to this category as “treasure hunt” SKUs. Offers an opportunity to examine a company’s business model, particularly since DG has been so successful competing with Wal-Mart where so many other retailers have not. While it started out as a family business in the five-and-dime tradition, it evolved to a close-out retail model where its unique low-overhead operations were advantageous. As it added highly consumable categories its mix shifted, but it managed to retain its low-overhead model. Interestingly, the mix shift was likely more an emergency strategy driven by store level operations than by top-down driven strategy. Frames the growth options available to DG’s CEO as he grapples with how to maintain growth.” Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=37642&R=607140-PDF-ENG&conversationId=1255800](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=37642&R=607140-PDF-ENG&conversationId=1255800)

<sup>44</sup> Case Description: “Focuses on the turnaround and strategic repositioning of Ducati, an Italian maker of high-end sport motorcycles, and describes the current concerns with the growth prospects of the company. Federico Minoli,

“eBay: Facing the Challenge of Global Growth”, Louis Marino and Patrick Kreiser, Thompson-Strickland-Gamble, 2007.

“Etsy: A ‘B Corp.’ Start-Up Takes on Amazon”, Ram Subramanian (Stetson University), Richard Ivey School of Business, Product Number: W16251, Version: April 29, 2016.<sup>45</sup>

“Eckerd Corporation”, Michael E. Porter and John C. Kelleher, Harvard Business School Case Study, Revised June 12, 2000.<sup>46</sup>

“Edward Jones in 2006: Confronting Success”, David Collis and Troy Smith, Harvard Business School Case Study, Revised March 21, 2012, Product number: 707497-PDF-ENG.<sup>47</sup>

“Elan and the Competition Ski Boat Industry”, Fiona Nairn and A.J. Strickland, Thompson-Strickland, 2001.<sup>48</sup>

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the CEO and strategic mind behind the turnaround, knew that Ducati could not grow indefinitely in its current niche. One alternative was to attack Harley Davidson’s niche with a Ducati interpretation of a cruiser.”  
Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=43026&R=701132-PDF-ENG&conversationId=1256012](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=43026&R=701132-PDF-ENG&conversationId=1256012)

<sup>45</sup> Case Description: “When Etsy proceeded with an initial public offering on the New York Stock Exchange in April 2015, it was the second U.S. company to go public as a certified B Corporation. Etsy’s status as a B Corporation meant that social responsibility was ingrained in its mission. However, as an online marketplace for artisanal goods, Etsy faced a number of challenges. Principal among them was the launch of the new online store ‘Handmade’ at Amazon, a direct attack on Etsy. Etsy had a core base of merchants and buyers, but Amazon had significantly more as well as a higher level of financial security than Etsy. Etsy’s fast growth had also put pressure on its merchants’ ability to offer larger quantities of handmade goods. Many merchants were pressing the company to allow sales from large-scale manufacturing, a path the company had eschewed since its start. Could Etsy find a way to successfully confront these challenges while maintaining its B Corporation ethos?” Source: <https://hbsp.harvard.edu/product/W16251-PDF-ENG?itemFindingMethod=Coursepacks>

<sup>46</sup> Case Description: “Describes the history and current situation in the retail pharmacy industry, including competition from new merchants and Internet drugstores. Eckerd, one of the top four drug chains, must decide how to position itself for the future.”  
Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=43719&R=799141-PDF-ENG&conversationId=1256280](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=43719&R=799141-PDF-ENG&conversationId=1256280)

<sup>47</sup> Case Description: “When Jim Weddle took over as Managing Partner of Edward Jones in January 2006, the brokerage firm was at a critical juncture. The firm’s distinctive strategy had enabled it to grow from its roots in small-town America to become the 4th largest broker in the U.S. Weddle was concerned, however, that the firm’s success, and the changing landscape of the financial services industry, were challenging the core aspects of the strategy that had brought the firm so far. He knew that the impending strategic decisions would determine whether Edward Jones could sustain its extraordinary performance and achieve its goal of growing to 20,000 financial advisors by 2017.”  
Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=46276&R=707497-PDF-ENG&conversationId=1256382](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=46276&R=707497-PDF-ENG&conversationId=1256382)

<sup>48</sup> Case Description: “A splendid case for drilling students in doing industry and competitive analysis and SWOT analysis, critiquing management’s proposed strategy and financial projections, and proposing analysis-based recommendations. A case setting that should generate strong student interest. Works great as a written case or for oral team presentations.”  
Source: <http://create.mheducation.com/cases/index.html#preview>

“EMI and the CT Scanner (A)”, Christopher A. Bartlett, Harvard Business School Case Study, Revised November 8, 2001, Product Number: 383194-PDF-ENG.<sup>49</sup>

“Ford-Transformation at Ford”, Leonard A. Schlesinger et al., Harvard Business School Case Study, Revised November 15, 1991.<sup>50</sup>

“General Electric Medical Systems, 2002”, Tarun Khanna, Harvard Business School Case Study, Revised February 26, 2003, Product number: 702428-PDF-ENG.<sup>51</sup>

“Gillette Company (A): Pressure for Change”, By Rosabeth Moss Kanter, James Weber. Publication Date: August 22, 2002. Product Number: 303032-PDF-ENG.<sup>52</sup>

“Giuseppe’s Original Sausage Company”, Michael T. Smith and Jana F. Kuzmicki, Thompson-Strickland, 2000.<sup>53</sup>

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<sup>49</sup> Case Description: “Describes the development of the first CT Scanner by EMI, a company new to the medical industry, and EMI’s entry into the U.S. market. The company’s early success is threatened by the entry of a dozen competitors (some very large and experienced), by government regulation, and by internal organizational problems.” Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=18319&R=383194-PDF-ENG&conversationId=1256525](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=18319&R=383194-PDF-ENG&conversationId=1256525)

<sup>50</sup> Case Description: “In 1980 Ford was near disaster. The company lost billions of dollars between 1980 and 1982. By 1988 the company had been transformed into one of the most successful corporations in the United States. Describes what happened and then examines how it happened. The major objective is to look at major change in a huge organization and the way the change was made.” Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=20585&R=390083-PDF-ENG&conversationId=1256602](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=20585&R=390083-PDF-ENG&conversationId=1256602)

<sup>51</sup> Case Description: “Discusses one of General Electric’s flagship divisions--the world’s leading provider of medical diagnostic imaging equipment. Provides an opportunity to examine a multinational confronting massive technological and demographic changes around the world. Genomics has created a global opportunity by making personalized medicine seem possible--medical intervention that caters to the genetic makeup of the individual and emphasizes prevention more than cure. Yet, the pursuit of this opportunity requires fundamental changes in the business model at a time when the model is being stressed by the idiosyncratic needs of catering to the large Chinese market and adapting to the needs of an aging population around the world. Demonstrates how multinationals can create value both by replicating their business models worldwide and by adroitly splitting the value chain across national boundaries.” Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=43194&R=702428-PDF-ENG&conversationId=1256950](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=43194&R=702428-PDF-ENG&conversationId=1256950)

<sup>52</sup> Case Description: “After years of strong performance with market-dominating brands, Gillette’s performance slips and a new CEO is selected from outside the company to lead a turnaround. This case describes the business and financial situation he inherited and asks what he should do during his first day and week on the job.” Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=15650&R=303032-PDF-ENG&conversationId=1699543](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=15650&R=303032-PDF-ENG&conversationId=1699543)

<sup>53</sup> Case Description: “Illustrates the strategic challenges and choices of a small owner-managed business struggling to gain distribution access for its products and carve out a niche for itself in the dinner sausage market. The company is only breaking even after 7 years of operation and some strategy changes are called for.” Source: <http://create.mheducation.com/cases/index.html#preview>

“Google Inc. in 2014”, Benjamin Edelman and Thomas R. Eisenmann, Harvard Business School Case Study, Publication Date: September 13, 2014. Product Number: 915004-PDF-ENG.<sup>54</sup>

“How CEOs Can Leverage Twitter”, Claudia Kubowicz Malhotra, Arvind Malhotra, MIT Sloan Management Review, Vol. 57, No. 2, Winter 2016.<sup>55</sup>

“How Venture Capitalists [VCs] Evaluate Potential Venture Opportunities”, Michael J. Roberts and Lauren Barley, Harvard Business School Case Study, Revised December 1, 2004. Product Number: 805019-PDF-ENG.<sup>56</sup>

“HTC Corp. in 2012”, David B. Yoffie, Juan Alcacer and Renee Kim, Harvard Business School Case Study, Revised September 26, 2012, Product Number: 712423-PDF-ENG.<sup>57</sup>

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<sup>54</sup> Case Description: “Describes Google’s history, business model, governance structure, corporate culture, and processes for managing innovation. Reviews Google’s recent strategic initiatives and the threats they pose to selected competitors. Asks what Google should do next.”

Source: <https://cb.hbsp.harvard.edu/cbmp/product/915004-PDF-ENG>

<sup>55</sup> Case Description: “This is an MIT Sloan Management Review article. Few CEOs of large companies leverage the power of Twitter to the fullest extent. As of September 2014, only 42 Fortune 500 CEOs had Twitter accounts. The authors argue that rather than waiting for impressions to be driven by the media or by individuals with ulterior motives, CEOs can use Twitter to help shape their public image and that of their companies. The authors studied the Twitter activity of 25 CEOs of publicly traded companies who were active on Twitter and identified common patterns and themes. Based on the type of content tweeted most often, the authors classified the CEOs they studied into four groups: Generalists, Expressionists, Information Mavens, and Business Mavens. Generalists used Twitter to share a wide range of content. At times they tweeted about personal opinions and interests; other times, they tweeted information closely related to the business (for example, strategy, existing products and services, customer references, etc.). However, on average they had the smallest networks among the groups of CEOs, perhaps because they were not sharing information that was unique. Expressionists used Twitter extensively for non-business content sharing. These CEOs shared their opinions about events and politics and gave their followers an insight into their daily lives. In many ways, they used Twitter as a brand-building platform for themselves as they do for their companies. Information Mavens frequently shared links to information, news, and other happenings. However, they did not generally tweet information specific to their company, acting more like curators of content. As a result, relatively few people retweeted or “favorited” their tweets. Business Mavens used Twitter extensively and primarily shared business-related content. In contrast to the other CEO groups that the authors identified, Business Mavens often shared new product announcements, information about existing products, customer references and information about management initiatives and strategy. Although they also used Twitter to share content related to personal opinions and interests and links to other interesting information, the majority of their tweets were business-related. As a group, the Business Mavens produced tweets that were retweeted and favorited more often than those of CEOs in the other three groups, and they had significantly larger follower networks. The authors’ research suggests that certain types of CEO tweets are more likely to be favorited and retweeted than others: tweets that provide new information.”

Source: <https://hbr.org/product/how-ceos-can-leverage-twitter/SMR540-PDF-ENG>

<sup>56</sup> Case Description: “Four venture capitalists from leading Silicon Valley firms are interviewed about the frameworks they use to evaluate potential venture opportunities. Questions include: How do you evaluate the venture’s prospective business model? What due diligence do you conduct? What is the process through which funding decisions are made? What financial analyses do you perform? What role does risk play in your evaluation? and How do you think about a potential exit route? Russell Siegelman, partner at Kleiner Perkins Caufield & Byers; Sonja Hoel, managing director at Menlo Ventures; Fred Wang, general partner at Trinity Ventures; and Robert Simon, director at Alta Partners, are interviewed.”

Source: <https://cb.hbsp.harvard.edu/cbmp/product/805019-PDF-ENG>

<sup>57</sup> Case Description: “After 15 years of remarkable achievements, Taiwan-based HTC Corp. faced difficult times by 2012. CEO Peter Chou, who drove HTC’s transformation from an unknown manufacturer of PDAs for other

“Husky Injection Molding Systems”, Jan W. Rivkin, Harvard Business School Case Study, Revised March 28, 2008, Product Number: 799157-PDF-ENG.<sup>58</sup>

“Ice-Fili”, Michael Rukstad, Sasha Mattu and Asya Petinova, Harvard Business School Case Study, Revised September 1, 2005, Product Number: 703516-PDF-ENG.<sup>59</sup>

“Indonesia’s Pharmaceutical Industry in 1998”, Carin-Isabel Knoop and Anthony St. George, Harvard Business School Case Study, Revised October 22, 1998, Product Number: 898220-PDF-ENG.<sup>60</sup>

“IT Management Simulation: Cyber Attack!”, Robert D. Austin, Harvard Business School Simulation Case Study, Product Number: 8691, October 2, 2018.<sup>61</sup>

companies to a well-known global player in smartphones, faced an uncertain and complex environment. Apple’s lead in the smartphone and tablet markets, the acquisition of Motorola by Google, the Microsoft-Nokia alliance, the rise of Samsung, and the extensive patent wars - each raised questions about how HTC could continue its upward trajectory. In a rapidly evolving and increasingly competitive market, what would a sustainable differentiation strategy look like for HTC? How could HTC, a historically innovative company, compete in the tablet market? And how could it weather - and mitigate - the patent wars?”

Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=4083258&R=712423-PDF-ENG&conversationId=1258510](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=4083258&R=712423-PDF-ENG&conversationId=1258510)

<sup>58</sup> Case Description: “Husky, a Canadian maker of injection molding systems, has established an enviable position in the market for plastics processing equipment. The company builds the highest performance systems in the business and charges a hefty premium for them. Husky is enjoying robust growth and record profits in 1996 when competitors attack its core markets. As financial results deteriorate rapidly, founder and CEO Robert Schad must decide how to defend Husky’s traditional markets and whether to expand beyond those markets.”

Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=43732&R=799157-PDF-ENG&conversationId=1258667](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=43732&R=799157-PDF-ENG&conversationId=1258667)

<sup>59</sup> Case Description: “Designed as an overview of all aspects of the strategy process: industry analysis, positioning, dynamics and sustainability, and scope issues of corporate strategy, including vertical integration, horizontal diversification, and location issues. Ice-Fili is the largest ice cream producer in Russia in 2002, but is facing strong competition from Nestle despite its success over other multinational competitors. Contains detailed exhibits, allowing deeper analyses.”

Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=45330&R=703516-PDF-ENG&conversationId=1258743](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=45330&R=703516-PDF-ENG&conversationId=1258743)

<sup>60</sup> Case Description: “This case describes the Indonesian pharmaceutical market in 1997 and the impact on the market of the Indonesian rupiah’s 75% devaluation since July 1997. Major foreign and domestic players are described. It raises the issue of how the Indonesian pharmaceutical market might change as a result of the crisis and whether the balance of power between local and global players has shifted. In the pharmaceutical industry, the Asian market--including Southeast Asia, Japan, China, Korea, and India--constituted one-third of global revenues and had experienced above average growth.”

Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=57165&R=898220-PDF-ENG&conversationId=1258888](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=57165&R=898220-PDF-ENG&conversationId=1258888)

<sup>61</sup> Case Description: “This engaging simulation teaches students key issues faced by managers when responding to an IT crisis. Playing the role of CTO at a company in the midst of a cyber attack, students will practice ascertaining priorities and making sound decisions that reinforce data preservation. They will navigate the complexities of making meaning in a crisis and communicating in a fast-paced environment, while learning the importance of crisis preparedness. In the first part of the simulation, students will confront a surge of information, conflicting opinions, and an evolving series of events that they must diagnose, react to, and recover from. In the second part of the



“Keller Williams Realty (A)”, James N. Baron and Brian Tayan, Stanford Graduate School of Business, Case HR-29, Date: April 12, 2007.<sup>62</sup>

“Kentucky Fried Chicken (Japan) Limited”, Christopher A. Bartlett, U. Srinivas Rangan, Harvard Business School Case Study, Revised December 30, 1992, Product Number: 387043-PDF-ENG.<sup>63</sup>

“Kmart: Striving for a Comeback”, John E. Gamble, Thompson-Gamble-Strickland, 2004.<sup>64</sup>

“Kodak at a Crossroads: The Transition from Film-Based to Digital Photography”, Boris Morozov and Rebecca J. Morris, Thompson-Strickland-Gamble, 2007.<sup>65</sup>

“KRCB Television and Radio: The Canary in the Coal Mine?”, Armand Gilinsky Jr. and Teresa M. Shern, Thompson-Strickland-Gamble, 2007.<sup>66</sup>

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simulation, students will be tasked with writing a public statement about the attack, and subsequently reviewing their peers' statements. Simulation play is synchronous, all students must be logged in at the same time.” Source: <https://hbsp.harvard.edu/product/8690-HTML-ENG?itemFindingMethod=Coursepacks>

<sup>62</sup> Case Description: “Describes the economic and cultural models that have led to the success of Keller Williams Realty. By 2006, Keller Williams was one of the most profitable real estate companies in the United States (if not the most profitable); in addition, it was on its way to becoming one of the largest in terms of number of agents (over 70,000). Describes the factors that led to this company’s success—including its operational model, compensation model, profit sharing model, and culture. Readers are asked to evaluate how these factors contribute to the company’s success and whether they will continue to enhance the company’s growth going forward. In addition, explores the critical role that culture and organizational practices can have on a company’s operating performance.” Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=68010&R=HR29-PDF-ENG&conversationId=1699474](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=68010&R=HR29-PDF-ENG&conversationId=1699474)

<sup>63</sup> Case Description: “Describes the internationalization of the Kentucky Fried Chicken (KFC) fast food chain, focusing on KFC’s entry into Japan. An entrepreneurial country general manager, Lou Weston, battles numerous problems to establish the business and is eventually highly successful. In doing so, Weston ignores or circumvents policies and control from KFC’s headquarters and becomes very upset when more sophisticated planning, coordination, and control systems begin to constrain his freedom. The case presents both the headquarters and subsidiary perspectives and allows discussion of the conflicts between strategic planning and control and entrepreneurial independence in a multinational company.” Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=21155&R=387043-PDF-ENG&conversationId=1259741](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=21155&R=387043-PDF-ENG&conversationId=1259741)

<sup>64</sup> Case Description: “The case profiles Kmart’s strategy, store operation practices, corporate culture, allocation of resources, and other implementation efforts under five CEOs, the company’s eventual fall into bankruptcy, and the efforts of recent CEOs to reverse Kmart’s declining fortunes in its struggle against Wal-Mart.” Sources: <http://create.mheducation.com/cases/index.html#preview>

<sup>65</sup> Case Description: “What should Kodak do now that demand for its traditional film products was rapidly declining. Should the company deemphasize traditional photography (about 70% of company revenues) and embrace digital photography? Was a digital-based strategy too risky for Kodak given that the digital photography market was highly competitive and that many competitors had a head start on Kodak?” Source: <http://create.mheducation.com/cases/index.html#preview>

<sup>66</sup> Case Description: “KRCB, a public TV and radio station, operates in a highly competitive marketplace and has come up with a comprehensive 16-point strategic plan to set its course for the next several years. But is it the right

“Krispy Kreme Doughnuts in 2006: Is a Turnaround Possible?”, Arthur A. Thompson and Amit J. Shah, Thompson-Strickland-Gamble, 2007.<sup>67</sup>

“Leadership and Team Simulation: Everest V3”, Michael A. Roberto, Amy C. Edmondson, Product Number: 8867-HTM-ENG, December 6, 2017.<sup>68</sup>

“LEGO (A): The Crisis”, Jan W. Rivkin, Stefan H. Thomke, and Daniela Beyersdorfer, Harvard Business School Case Study, February 5, 2013, Product Number 9-713-478.<sup>69</sup>

“Lincoln Electric”, Jordan Siegel, Harvard Business School Case Study, Revised August 25, 2008, Product Number: 707445-PDF-ENG.<sup>70</sup>

strategic plan? Will it work in the face of such tough competition for viewer and listener audiences? Can KRCB find ways to raise the monies it will need to support attract programming?”

Source: <http://create.mheducation.com/cases/index.html#preview>

<sup>67</sup> Case Description: “This freshly updated case calls for students to explore how a company firing on all cylinders can go so wrong so quickly. Besieged with declining doughnut sales, failing franchises, and problems with false and misleading financial statements over the past 20 months, can the company be salvaged? Is a turnaround possible? How does a company with a tarnished reputation put the luster back on its product and reignite rapid growth? Accompanying video available.”

Source: <http://create.mheducation.com/cases/index.html#preview>

<sup>68</sup> “This award-winning simulation uses the dramatic context of a Mount Everest expedition to reinforce student learning in group dynamics and leadership. Students play one of 5 roles on a team of climbers attempting to summit the mountain. During each round of play they must collectively discuss whether to attempt the next camp en route to the summit. Ultimately, teams must climb through 5 camps in 6 simulated days totaling approximately 1.5 actual hours of seat time. Team members analyze information on weather, health conditions, supplies, goals, and hiking speed, and determine how much of that information to communicate to their teammates. Along the journey, the team must also make decisions in response to 3 hidden challenges which affect their ascent, hiking speed, health, and overall success... To learn how to build, participate in, and lead effective teams, as well as to examine: 1. How teams can improve the way they make decisions, 2. How opposing interests and asymmetric information affect team dynamics, 3. How leaders shape team decision-making and performance in competitive and time-sensitive situations, 4. How teams and their leaders deal with tradeoffs between short-term task completion and longer-term team effectiveness, and 5. How cognitive biases impair decision making.”

Source: <https://hbsp.harvard.edu/product/8867-HTM-ENG?>

<sup>69</sup> Case Description : “As this case opens, iconic toymaker LEGO stands on the brink of bankruptcy. Jorgen Vig Knudstorp, LEGO’s young and newly appointed CEO, must size up changes in the toy industry, learn from the company’s recent moves, and craft a strategy that will put LEGO back on track.”

Source: <https://cb.hbsp.harvard.edu/cbmp/product/713478-PDF-ENG>

<sup>70</sup> Case Description: “The case describes Lincoln Electric’s business strategy and incentive system, and it discusses the global strategy choices that the company faces going forward. Lincoln Electric is deciding whether a strong push into India should be the next step in the company’s globalization. The company has enjoyed increasing success in China as a result of its aggressive expansion through both a joint venture and set of majority-owned plants. The company is deciding how it could apply the lessons of the Chinese experience, as well as the lessons of its experience across Asia, Europe, and Latin America, to India. First of all, should Lincoln Electric own a manufacturing operation in India? If yes, Lincoln Electric could enter the India market by acquisition, by joint venture, or by building a new plant on its own. If the company were to enter by acquisition, it was unclear what type of valuation to apply to any of the Indian incumbent companies. If the company were to enter by joint venture, the question was: How could Lincoln ensure its ability to make key business decisions? If the company were to build its own plant, the question was: Would the cost of starting from scratch be more than sufficiently compensated by the total control the company would enjoy?”

“Louis Vuitton”, Mary M. Crossan and Manu Mahbubani, Richard Ivey School of Business, Revised April 4, 2013, Product Number: 9B13M022.<sup>71</sup>

“Mattel’s Strategy After Its Recall of Products Made in China”, Jiangyong Lu, Tao Zhigang, and Yu LinHui, The Asia Case Research Centre, University of Hong Kong, Publication Date: February 11, 2009. Prod. #:HKU810-PDF-ENG.<sup>72</sup>

“Making it Big”, Joan Winn, Thompson et al, 2005.<sup>73</sup>

“Marketing Myopia”, Theodore Levitt, Harvard Business Review, July 1, 2004 (Best of HBR 1960), Product Number: R0407L-PDF-ENG.<sup>74</sup>

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Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=46317&R=707445-PDF-ENG&conversationId=1259880](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=46317&R=707445-PDF-ENG&conversationId=1259880)

<sup>71</sup> Case Description: “Louis Vuitton, the flagship group within Moët Hennessy Louis Vuitton (LVMH), had contributed to the stellar growth of the group in 2010 and 2011. But, there were clouds on the horizon. Was the recent growth sustainable? What steps should Louis Vuitton take to address upcoming challenges? This case takes the student through the challenges a global company faces as it tries to grow a business that is based on one of the most valued high-end brands in the world. The case reveals the fundamental strategic tension between what a firm needs to do, given the competitive environment, what it can do, given its resources and organization, and what leaders want to do, given their fundamental motivations and beliefs, which shape the way they see the issues.”  
Source: <https://www.iveycases.com/ProductView.aspx?id=57493>

<sup>72</sup> Case Description: “In the summer of 2007, Mattel, the largest toymaker in the US, made several recalls of products that had been made in China. The recalls led not only to a sharp reduction in Mattel’s sales but also to public hearings in the US Congress, which significantly affected Mattel’s reputation. Like other toymakers, Mattel has been relocating its production abroad, outsourcing the manufacture of parts and components. Indeed, 65% of Mattel’s products are made in China. In contrast to its competitors, however, Mattel has understood the importance of quality control in this relocation/outsourcing process. In the 1980s, it reversed its earlier strategy of outsourcing to factories in Asia by owning and operating some plants in Asia for producing its most popular products. The product recalls show that quality control continues to be an issue. This case explores Mattel’s strategy for organizing production, the trade-offs between in-house production and outsourcing, and the trade-offs between different production locations.” Source:  
[http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=466157&R=HKU810-PDF-ENG&conversationId=1699577](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=466157&R=HKU810-PDF-ENG&conversationId=1699577)

<sup>73</sup> Case Description: “The major decision point in the case concerns Cynthia Rigg’s dilemma of how to rejuvenate her company’s growth. A secondary issue concerns the role that Cynthia should take in leading the company for the future and what needs to be done to take the company to “the next level.” An excellent case for use in the first half of the course.”  
Source: <http://create.mheducation.com/cases/index.html#preview>

<sup>74</sup> Description: “At some point in its development, every industry can be considered a growth industry, based on the apparent superiority of its product. But in case after case, industries have fallen under the shadow of mismanagement. What usually gets emphasized is selling, not marketing. This is a mistake, because selling focuses on the needs of the seller, whereas marketing concentrates on the needs of the buyer. In this widely quoted and anthologized article, first published in 1960, Theodore Levitt argues that “the history of every dead and dying ‘growth’ industry shows a self-deceiving cycle of bountiful expansion and undetected decay.” But, as he illustrates, memories are short. The railroads serve as an example of an industry whose failure to grow is due to a limited market view. Those behind the railroads are in trouble not because the need for passenger transportation has declined or even because cars, airplanes, and other modes of transport have filled that need. Rather, the industry is failing because those behind it assumed they were in the railroad business rather than the transportation business. They were railroad oriented instead of transportation oriented, product oriented instead of customer oriented. For

“Microsoft in 2004”, Michael G. Rukstad and David B. Yoffie, Harvard Business School Case Study, Revised November 22, 2004, Product Number: 704508-PDF-ENG.<sup>75</sup>

“McDonald’s (in 2013): How to Win (Again)?”, Marne L. Arthaud-Day; Frank T. Rothaermel; Justin Collins, , McGraw-Hill Education, January 3, 2013, MH0021-PDF-ENG.<sup>76</sup>

“Merck and the Recall of Vioxx”, Arthur A. Thompson, Thompson-Strickland-Gamble, 2007.<sup>77</sup>

“The Morgan Motor Car Company: The Last of the Great Independents”, P.G. Goulet and A. Rappaport, The Society for Case Research, 1993.<sup>78</sup>

“Mount Everest – 1996”, Michael A. Roberto and Gina M. Carioggia, Harvard Business School Case Study, Revised January 6, 2003, Product Number: 303061-PDF-ENG.<sup>79</sup>

companies to ensure continued evolution, they must define their industries broadly to take advantage of growth opportunities. They must ascertain and act on their customers’ needs and desires, not bank on the presumed longevity of their products. In short, the best way for a firm to be lucky is to make its own luck. An organization must learn to think of itself not as producing goods or services but as doing the things that will make people want to do business with it. And in every case, the chief executive is responsible for creating an environment that reflects this mission.” Source: <https://cb.hbsp.harvard.edu/cbmp/product/R0407L-PDF-ENG>

<sup>75</sup> Case Description: “Surveys Microsoft’s expansion into new businesses, such as mobile and embedded devices, home and entertainment, and business solutions, as it faces challenges due to size and maturity and outside threats from Linux and Google. A rewritten version of an earlier case.”  
Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=45520&R=704508-PDF-ENG&conversationId=1260036](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=45520&R=704508-PDF-ENG&conversationId=1260036)

<sup>76</sup> Case Description: “Don Thompson became CEO of McDonald’s in July of 2012. McDonald’s total shareholder fell from 34.7% in 2011 to -10.75% from 2011 to 2012. Thompson is under fire to turn things around in 2013. Former CEO Jim Skinner’s “Plan to Win” had turned the company around in the last decade, and Thompson, Chief Operating Officer under Skinner, was looking to recreate that success. Thompson wanted to focus on improving the menu, customer experience, and McDonald’s brand.” Source: <https://cb.hbsp.harvard.edu/cbmp/product/MH0021-PDF-ENG>

<sup>77</sup> Case Description: “Students are called upon to explore whether Merck executives acted ethically in researching the safety of Vioxx and in their marketing of Vioxx. Did Merck executives live up to the company’s core values in their handling of the research, marketing, and recall of Vioxx? Perfect for your module on strategy, ethics, and social responsibility and certain to stimulate heated class debate.”  
Source: <http://create.mheducation.com/cases/index.html#preview>

<sup>78</sup> Case Description: “Producing about 400 cars a year, with three models essentially unchanged since the 1930s Morgan attracts a cult following around the world. This case introduces a corporate culture that has made time stand still and a firm conducting itself in ways that seem virtually unknown in modern manufacturing. The issue here is the intrusion into this demi-paradise of a famous consultant who is concerned that the firm cannot survive a major environmental change unless it makes more money. Morgan is afraid it will be somehow damaged if it makes changes.”  
Source: <http://create.mheducation.com/cases/index.html#preview>

<sup>79</sup> Case Description: “Describes the events that transpired during the May 1996, Mount Everest tragedy. Examines the flawed decisions that climbing teams made before and during the ascent.”  
Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=15678&R=303061-PDF-ENG&conversationId=1260330](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=15678&R=303061-PDF-ENG&conversationId=1260330)

“Netflix”, Willy Shih, Stephen Kaufman and David Spinola, Harvard Business School Case Study, Revised January 6, 2003, Product Number: 607138-PDF-ENG.<sup>80</sup>

“Non Stop Yacht, S.L.”, Charlene Nicholls-Nixon, Thompson et al, 2003.<sup>81</sup>

“No Pudge! - Growth, Strategy and Slotting at No Pudge! Foods, Inc.”, Chris Robertson, Thompson et al, Revised October 22, 2009.<sup>82</sup>

“Porsche – Dr. Ing. h.c. F. Porsche AG (A): True to Brand?”, Jeffrey Fear and Carin-Isabel Knoop, Harvard Business School Case Study, Revised March 14, 2007, Product Number: 706018-PDF-ENG.<sup>83</sup>

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<sup>80</sup> Case Description: “Reed Hastings founded Netflix with a vision to provide a home movie service that would do a better job satisfying customers than the traditional retail rental model. But as it encouraged challenges it underwent several major strategy shifts, ultimately developing a business model and an operational strategy that were highly disruptive to retail video rental chains. The combination of a large national inventory, a recommendation system that drove viewership across the broad catalog, and a large customer base made Netflix a force to be reckoned with, especially as a distribution channel for lower-profile and independent films. Blockbuster, the nation’s largest retail video rental firm, was initially slow to respond, but ultimately rolled out a hybrid retail/online response in the form of Blockbuster Online. Aggressive pricing pulled in subscribers, but at a price to both it and Netflix. But a new challenge was on the horizon: video-on-demand. How should Netflix respond?”

Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=37627&R=607138-PDF-ENG&conversationId=1260395](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=37627&R=607138-PDF-ENG&conversationId=1260395)

<sup>81</sup> Case Description: “NSY [Non Stop Yacht] has reached a strategic inflection point. Founded as a virtual organization to function as the Web-based purchasing agent of choice for crew members and yacht management companies, NSY has been forced to reinvent itself as more of a brick-and-mortar company linking buyers (yacht management companies, shipbuilding yards and yacht crews) of yacht parts with suppliers (manufacturers and distributors). An excellent case for underscoring why a company’s strategy ends up being partly planned and partly a response to unanticipated conditions.”

Source: <http://create.mheducation.com/cases/index.html#preview>

<sup>82</sup> Case Description: “The health and fitness trend that started in the 1980s and became a staple of American lifestyle in the 1990s created numerous opportunities for new firms to introduce niche products. The founder of No Pudge! Brownies worked with a consultant to develop a fat-free brownie mix. She then designed a lean organization where production, distribution and Internet orders were all outsourced. Immediately she is faced with her “Achilles heel,” the slotting fees required by supermarkets to obtain shelf space. After two years of negotiating with supermarkets, an important grocery chain finally agrees to carry her product without any slotting fees. By 1997 sales totaled a meager \$250,000. Aggressive lobbying with the National Food Distributors Association and a multi-pronged strategy for dealing with slotting eventually pushed sales above the \$2 million mark. No Pudge! is at a major decision point. New growth opportunities, such as muffin mix and fast-food distribution of pre-made brownies are abundant. Slotting continues to be a source of frustration for the firm, and No Pudge! is now on the radar screen as a possible acquisition target by major food purveyors.”

Source: <http://create.mheducation.com/cases/index.html#preview>

<sup>83</sup> Case Description: “Examines one of the most important entrepreneurial decisions made in the history of Porsche, made in early 1998: to build a sport utility vehicle (SUV)--the Cayenne. After decades of relying on one or two sports car models and nearly going bankrupt and losing its independence in 1993, Porsche had to diversify its product lines. Also examines the branding implications of the internationalization of production.”

Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=45651&R=706018-PDF-ENG&conversationId=1260611](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=45651&R=706018-PDF-ENG&conversationId=1260611)

“PC&D, Inc.”, Richard G. Hamermesh and Evelyn T. Christiansen, Harvard Business School Case Study, Revised March 7, 1986, Product Number: 380072-PDF-ENG.<sup>84</sup>

“Peter Green’s First Day”, John B. Matthews Jr. and Laura L. Nash,” John B. Matthews and Laura L. Nash, April 1, 1980, Product Number: 380186-PDF-ENG.<sup>85</sup>

“Polaroid Corporation: Digital Imaging Technology in 1997”, Richard S. Rosenbloom and Ellen Pruyne, Harvard Business School Case Study, October 16, 1997, 798013-PDF-ENG.<sup>86</sup>

“Princeton Financial Systems: Making the Right Decision for Growth – Part A”, Fox School of Business.

“Renault Nissan: The Challenge of Sustaining Strategic Change”, Kannan Ramaswamy, Thunderbird School Of Global Management, 2008, Product Number: A09-08-0011.<sup>87</sup>

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<sup>84</sup> Case Description: “Covers history of PC&D from 1960 to 1975 as it grows from a single business firm to a diversified firm. Emphasizes the use of subsidiaries for product development and fast growth. Other issues include problems of a new CEO in keeping control of fast growing divisions.”

Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=17142&R=380072-PDF-ENG&conversationId=1260662](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=17142&R=380072-PDF-ENG&conversationId=1260662)

<sup>85</sup> Case Description: “Peter Green, a new salesperson for Scott Carpets, learns firsthand that his largest account has always been given a discount based on falsified information and expects the same preferred treatment to continue. Peter’s boss condones the discount. Peter must decide whether to pursue the order on these conditions and how to handle his already shattered relationship with his boss.”

Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=17104&R=380186-PDF-ENG&conversationId=1260742](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=17104&R=380186-PDF-ENG&conversationId=1260742)

Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=17104&R=380186-PDF-ENG&conversationId=1260742](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=17104&R=380186-PDF-ENG&conversationId=1260742)

<sup>86</sup> Case Description: “Focuses on strategic decisions regarding investment in digital imaging technology facing Polaroid Corp., a worldwide leader in the traditional imaging marketplace, in July 1997. New Polaroid CEO Gary DiCamillo must decide how much emphasis to place on digital vs. traditional imaging technology, how to restructure the organization to capitalize on this new technology, and whether to support a new proposal to develop a digital camera for the mass market.”

Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=45151&R=798013-PDF-ENG&conversationId=1260918](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=45151&R=798013-PDF-ENG&conversationId=1260918)

<sup>87</sup> Case Description: “The case discusses the story of Nissan’s miraculous turnaround after Renault decided to invest in the company. The automobile industry had just begun another wave of consolidation, and many industry leaders believed that size was crucial for survival. This conclusion led to several mergers and acquisitions that produced varying results. The deal concluded between Renault and Nissan was remarkable because it was not billed or designed as an acquisition or even a joint venture. It was structured as an alliance, emphasizing the fact that both companies would have their own separate identities in the marketplace and separate executive committees that would run their strategy. However, the benefits were expected to originate in cross-company synergies, ranging from design to manufacturing and logistics to R&D. The case offers a rich description of the critical competitive elements that characterized the industry at the time the deal was signed. It also provides a good background on the strengths and weaknesses associated with each of the two companies before getting into the details associated with creating the turnaround plan and its implementation. The study paints a very good picture of the internal challenges that Carlos Ghosn, the incoming leader from Renault, faced in implementing the significant changes that were called for. It particularly emphasizes people-related issues such as performance management, creating change in a tradition-bound culture, the weight of administrative heritage and its impact on performance management, and other related issues. Given the global nature of the setting, the cross-cultural angles provide additional insights into the challenges leaders face when given a mandate for change. The case ends with a description of Renault and Nissan,

“Royal Dutch/Shell in Nigeria (A)”, Lynn Sharpe Paine and Mihnea C. Moldoveanu, Harvard Business School Case Study, Revised October 1, 2009, Product Number: 399126-PDF-ENG.<sup>88</sup>

“Samsung Electronics”, Jordan Siegel and James Jinho Chang, Harvard Business School Case Study, Revised February 27, 2009, Product Number: 705508-PDF-ENG.<sup>89</sup>

“SAS Institute (A): A Different Approach to Incentives and People Management Practices in the Software Industry”, Jeffrey Pfeffer, Graduate School of Business, Stanford University, Revised January 1998, Product number: HR6-PDF-ENG.<sup>90</sup>

“Satellite Radio”, Thomas Bisenmann and Alastair Brown, Harvard Business School Case Study, Revised November 20, 2003, Product Number: 802175-PDF-ENG.<sup>91</sup>

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both of which reported poor performance in late 2007. Ghosn had been at the helm of both firms for some time already, and was finding it difficult to sustain the momentum behind the change.”

Source: <http://caseseries.thunderbird.edu/case/renault-nissan-challenge-sustaining-change>

<sup>88</sup> Case Description: “Working with Shell’s country manager for Nigeria, the company’s Committee of Managing Directors must decide how to respond to the Nigerian government’s decision to impose the death sentence on Ken Saro-Wiwa and eight other leaders of a movement for the rights of the Ogoni (one of Nigeria’s 240 ethnic groups). As the case opens, Saro-Wiwa and his codefendants have just been found guilty of inciting murder in a trial that international observers have criticized as deeply flawed. Saro-Wiwa, an environmentalist, writer, businessman, television producer, and human rights activist, has been a vocal critic of not only the Nigerian government but also Shell. Provides background on Shell, on its business in Nigeria, and on environmental and human rights issues in the Niger Delta.”

Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=21981&R=399126-PDF-ENG&conversationId=1261197](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=21981&R=399126-PDF-ENG&conversationId=1261197)

<sup>89</sup> Case Description: “When is it possible to create a dual advantage of being both low cost and differentiated? In this case, students assess whether Samsung Electronics has been able to achieve such a dual advantage, and if so, how this was possible. Moreover, Samsung Electronics’ long-held competitive advantage is under renewed attack. Students also can assess how Samsung should respond to large-scale Chinese entry into its industry.”

Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=45636&R=705508-PDF-ENG&conversationId=1261351](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=45636&R=705508-PDF-ENG&conversationId=1261351)

<sup>90</sup> Case Description: The SAS Institute is a large, growing software company headquartered in the Research Triangle in North Carolina. Founded more than 25 years ago, it has evolved a unique approach, given its industry, to developing and retaining talent including using no stock options or phantom stock and not paying its salespeople on commission. The CEO and Vice President of Human Resources must decide how well their current management practices will continue to serve them as the company gains greater visibility and faces an increasingly competitive labor market.” Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=67969&R=HR6-PDF-ENG&conversationId=1699359](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=67969&R=HR6-PDF-ENG&conversationId=1699359)

<sup>91</sup> Case Description: “In early 2002, XM and Sirius were fighting for control of the emerging U.S. market for satellite radio. Each company targeted consumers in automobiles, providing 100 channels of CD-quality audio for a monthly subscription fee of \$10-\$13. Wall Street analysts predicted that these companies would be profitable by 2005-2006, but investors were increasingly skeptical of ventures that required huge, irrevocable bets on customer acquisition and infrastructure. This case describes the business models of the satellite radio companies, the technology they employed, and their target markets. Poses questions about their pricing strategies, strategic partnerships with auto manufacturers, and whether they should develop interoperable radios that receive either company’s signals.”

“Sears, Roebuck and Co. vs. Wal-Mart Stores, Inc.”, Gregory S. Miller and Christopher Noe, Harvard Business School Case Study, Revised October 25, 2002, Product Number: 101011-PDF-ENG.<sup>92</sup>

“Sunrise Medical, Inc.’s Wheelchair Products”, Anita M. McGahan, Harvard Business School Case Study, Revised October 16, 1995, Product Number: 794069-PDF-ENG.<sup>93</sup>

“Teach for America 2005”, Stacey Childress, Harvard Business School, Revision Date: October 13, 2005, Product Number: 805094-PDF-ENG.<sup>94</sup>

“The Adventures of an IT Leader,” Robert D. Austin, Richard L Nolan, and Shannon O’Donnell, Harvard Business Review Press, Boston, Massachusetts, 2016, Product Number: 10018E-KND-ENG.<sup>95</sup>

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Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=50156&R=802175-PDF-ENG&conversationId=1261293](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=50156&R=802175-PDF-ENG&conversationId=1261293)

<sup>92</sup> Case Description: “This case is designed to familiarize students with the use of financial ratios. Two retailers, Sears, Roebuck and Co. and Wal-Mart Stores, Inc., have a very similar value for return on equity (ROE) in the 1997 fiscal year. Students use the information in the case and the accompanying exhibits, which include financial statements as well as disclosures regarding corporate strategies and accounting policies for each company, to analyze the value creation process for each firm. This case provides a good introduction regarding the combination of such information to create a powerful tool for financial statement analysis. A rewritten version of an earlier case.”  
Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=334&R=101011-PDF-ENG&conversationId=1262007](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=334&R=101011-PDF-ENG&conversationId=1262007)

<sup>93</sup> Case Description: “Sunrise’s CEO must decide whether to intervene in a decision by a division, Guardian Products, to introduce a new lightweight standard wheelchair. Guardian wants to introduce the wheelchair to complement its line of commodity crutches, walkers, and other patient aids. If introduced, the new wheelchair will compete with an existing product offered by the largest and most profitable Sunrise division, Quickie Designs. The CEO hesitates to take action because he does not want to disrupt a precedent of total divisional autonomy that is integral to Sunrise’s culture.”  
Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=44172&R=794069-PDF-ENG&conversationId=1262172](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=44172&R=794069-PDF-ENG&conversationId=1262172)

<sup>94</sup> Case Description: “On November 17, 2004, as Teach for America’s (TFA) national board meeting adjourned, Chief Operating Officer Jerry Hauser considered the opportunity before the organization. The board had just given the go ahead to move forward with development of a new strategic plan for 2005 through 2010. The aspirations were ambitious, and if they succeeded in reaching the goals set out in the plan, TFA would take its place among the country’s most enduring institutions. Hauser knew that the key to converting a plan into success was ensuring that the organization had the right strategy and the capacity to execute effectively. As he looked toward the future, he reflected on the opportunities and challenges that TFA had faced in its first 15 years to identify lessons that might be useful for its next phase of growth.”  
Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=51128&R=805094-PDF-ENG&conversationId=1699219](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=51128&R=805094-PDF-ENG&conversationId=1699219)

<sup>95</sup> “What does it take to lead and manage your company's tech? Becoming an effective IT leader and manager presents a host of challenges--from anticipating emerging technologies, to managing relationships with senior executives, vendors, and employees, to communicating with the board. A good IT leader must also be a strong business leader. This book--now thoroughly updated with a new preface by the authors and current tech details and terminology--invites you to accompany new CIO Jim Barton as he steps up to leadership at his company. You'll get a deeper understanding of the role of IT in your own organization as you see Jim struggle through a tough first year, handling (and fumbling) all kinds of management challenges. Although fictional, the scenarios are based on the



“The Case of Unidentified Industries – 1995”, William E. Fruhan, Harvard Business School Case Study, January 9, 1996, Product Number: 296049-PDF-ENG.<sup>96</sup>

The Case of Unidentified Industries – 2006, William E. Fruhan, Harvard Business School, Product Number: 207096-PDF-ENG.<sup>97</sup>

“The Globalization of the NFL”, Juan Alcacer, Mary Furey, Harvard Business School Case Study, January 8, 2011 (Revised: October 25, 2012), Product Number: 711455-PDF-ENG.<sup>98</sup>

“The National Football League [NFL] and Brain Injuries”, Richard G. Hamermesh; Matthew Preble, Harvard Business School Case Study, Revised: June 4, 2015, Product Number: 815071-PDF-ENG.<sup>99</sup>

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authors' long experience working with real-life companies across industries and sectors. "The Adventures of an IT Leader" is both an insightful story and an instructive guidebook. You can read it from beginning to end or treat it as a series of cases, skipping around to different chapters that address your most pressing needs. (For example, if you need to learn about crisis management and security, read chapters 10-12.) You can also test yourself and think about how to use the book's lessons in your own company by reading the authors' "Reflection" questions at the end of each chapter. This book is your indispensable manual for IT management and leadership, no matter what business you're in." Source: <https://store.hbr.org/product/the-adventures-of-an-it-leader-updated-edition-with-a-new-preface-by-the-authors/10018>

<sup>96</sup> Case Description: “[The Case of Unidentified Industries] Helps students to understand how the characteristics of a business are reflected in its financial statements.”

Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=14324&R=296049-PDF-ENG&conversationId=1262759](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=14324&R=296049-PDF-ENG&conversationId=1262759)

<sup>97</sup> Case Description: “Helps students to understand how the characteristics of a business are reflected in its financial statements.”

Source: <https://cb.hbsp.harvard.edu/cbmp/product/207096-PDF-ENG>

<sup>98</sup> Case Description: “By 2010, the National Football League (NFL) was still having trouble attracting both a global roster and fan base despite systemized attempts at internationalizing since 1989. Why? Was it simply a bad idea to try to export football, a sport that many considered uniquely American? Or was it a good idea that had been poorly executed?”

Source: <https://hbsp.harvard.edu/product/711455-PDF-ENG>

<sup>99</sup> Case Description: “The National Football League (NFL) was both the most popular spectator sport in the U.S. and a major economic entity, taking in roughly \$10 billion a year in revenue. However through the early twenty-first century, an increased understanding of the long-term effects of head injuries on NFL players indicated a serious threat to the long-term viability of the game. Particularly concerning was the indication that some deceased professional football players had developed chronic traumatic encephalopathy (CTE) - a neurodegenerative disease which had a strong influence on a person’s mental and physical health-most likely as a result of repetitive hits sustained during their football careers and which may have contributed to their deaths. Over 4,000 retired players had jointly sued the NFL over the head injuries they had sustained during their time in the NFL and the resulting health problems they attributed to these injuries. In part, the lawsuit alleged that the NFL had not been forthcoming with players about the health risks of head injuries. The two sides had reached a tentative \$765 million settlement in 2013, the bulk of which would go to compensating retired players suffering from such diseases as Alzheimer’s or dementia. While this settlement compensated retired players, it was not applicable to current or future players. Could the NFL preserve the sport by making it safer through new rules or equipment changes, or was football an inherently physical game that no amount of new rules or equipment could make completely safe? Were current and future players, now knowing full well the potential long-term health implications of football, tacitly accepting the risks involved? As a team owner, is now the time to sell while franchise value and fan support are at their peaks, or will the business of the NFL be viable for years to come?”

“The Video-Streaming Wars in 2019: Can Disney Catch Netflix?”, Anita Elberse and Monica Cody, Harvard Business School Case Study, Revised January 10, 2020, Product Number: 9-519-094.<sup>100</sup>

“TiVo – Strategic Inflection: TiVo in 2005”, David B. Yoffie and Pat Ling Yin, Harvard Business School Case Study, Revised March 13, 2006, Product Number: 706421-PDF-ENG.<sup>101</sup>

“Toyota: Driving the Mainstream Market to Purchase Hybrid Electric Vehicles”, Jeff Saperstein and Jennifer Nelson, Richard Ivey School of Business, Revised September 10, 2009, Product Number: 9B04A003.<sup>102</sup>

“UPS – A Manager’s Challenge: UPS Battles FedEx”, Jones-Geore, 2002.

“The Vaught Pharmacy”, Edwin C. Leonard Jr. and Lisa D. Leonard, The Society For Case Research, 1993.<sup>103</sup>

“W.L. Gore & Associates Inc. in 1998”, Frank Shipper and Charles C. Manz, Thompson-Strickland, 2001.<sup>104</sup>

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Source: <https://cb.hbsp.harvard.edu/cbmp/product/815071-PDF-ENG>

<sup>100</sup> Case Description - “Bob Iger, chief executive officer of entertainment conglomerate Disney, thrilled investors with details about Disney's upcoming foray into video streaming in April 2019. Disney's move was only the latest in a series of actions taken by new and established entertainment companies in a fight for dominance in the video-streaming-subscription space. Netflix, led by chief executive officer Reed Hastings, had established an early foothold in that market after entering in early 2007, amassing 140 million subscribers worldwide by early 2019 and spending \$10 billion on content annually. Now, Disney was joining the fray with its signature service, Disney+, after first collaborating with other broadcasters in establishing Hulu, later buying up a majority stake in that service, and launching sports-content subscription service ESPN+. The battle for what many industry observers regarded as the future of the television business was truly on. Had Iger and his team of executives found the right formula to unseat Netflix as the leader in video streaming? Was there room for both players in the marketplace? Or would Hastings and his team at Netflix need to respond in some way to the looming threat posed by Disney?”  
Source: <https://hbsp.harvard.edu/product/519094-PDF-ENG?itemFindingMethod=Search+AutoSuggest>

<sup>101</sup> Case Description: “In the late 1990s, TiVo pioneered the digital video recorder (DVR), a new consumer electronics category. By 2005, the company was the clear leader in technology and installed base. It had also built extraordinary loyalty among its customers. However, TiVo lost a half billion dollars since its founding and was now facing new, fierce competition from satellite and cable providers. Explores the strategic challenges facing TiVo and the potential strategic options for fending off its competitive threats and reversing its financial fortunes.”  
Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=45971&R=706421-PDF-ENG&conversationId=1262985](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=45971&R=706421-PDF-ENG&conversationId=1262985)

<sup>102</sup> Case Description: “Toyota is a large, international automobile manufacturer headquartered in Japan, with plans to become the largest worldwide automaker, striving for 15 per cent of global sales. Toyota is committing itself to be the leader of the hybrid-electric automotive industry, and is relying on changes in the industry and customer perceptions to bring its plan to fruition. Toyota’s challenge is to develop consumer attitude and purchase intent, from an early adopter, niche market model into universal mainstream acceptance.”  
Source: <https://www.iveycases.com/ProductView.aspx?id=32164>

<sup>103</sup> Case Description: “This case describes the difficulties facing a family-owned pharmacy attempting to survive in a mature, highly competitive industry.”  
Source: <http://create.mheducation.com/cases/index.html#preview>

“What’s Stifling the Creativity at CoolBurst”, Suzy Wetlauder et al, Harvard Business Review, Publication Date: September 1, 1997. Product Number: 97511-PDF-ENG.<sup>105</sup>

“Xerox Corporation: Leadership Through Quality (A)”, Todd D. Jick et al, Harvard Business School Case Study, Revised May 29, 1996, Product Number: 490008-PDF-ENG.<sup>106</sup>

“Yahoo! – “So Many Countries, So Many Laws”: Yahoo!, Legal Uncertainty and the Internet Case I, II, and III”, Susanna Monseau, and Yvette Essounga, Rider University, 2003.

“Zara: Fast Fashion”, Pankaj Ghemawat and Jose Luis Nueno, Harvard Business School Case Study, Revised December 21, 2006, Product Number: 703497-PDF-ENG.<sup>107</sup>

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<sup>104</sup> Case Description: “This unconventionally organized company (whose best-known product is Gore-Tex) has some intriguing approaches to empowering, compensating, and motivating its employees and has been quite successful in championing the efforts of enterprising employees to come up with innovative new products.”  
Source: <http://create.mheducation.com/cases/index.html#preview>

<sup>105</sup> Case Description: “This fictitious case study explores the challenges facing CoolBurst, a Miami-based fruit-juice company. For over a decade, CoolBurst had ruled the market in the Southeast. Why, then, are its annual revenues stuck at \$30 million, and why have profits been stagnant for four years straight? CoolBurst’s new CEO, Luisa Reboredo, knows that the company’s survival--and her own--depend on the answers. Reboredo has succeeded former utilitarian CEO Garth LeRoue. While LeRoue had undeniably made CoolBurst into the well-oiled machine it was, he’d also been stubborn in enforcing a culture of tradition, self-discipline, and respect for authority--a culture so staid and polite, it left little room for employees to be creative. LeRoue, for instance, had almost fired two of CoolBurst’s most creative employees for inventing four new drinks without his permission. Sam Jenkins, one of those employees, had been so angered by the incident that he left the company to work for CoolBurst’s largest competitor. How can Reboredo encourage her employees to start thinking creatively. And how can she nurture any creative individuals who may join the company in the future? In 97511 and 97511Z, commentators Paul Barker, Teresa M. Amabile, Manfred F.R. Kets de Vries, Gareth Jones, and Elspeth McFadzean offer advice on this fictional case study.”  
Source: <https://hbr.org/1997/09/whats-stifling-the-creativity-at-coolburst>

<sup>106</sup> Case Description: “Describes the “Leadership Through Quality” effort undertaken by Xerox in the 1980s. Includes the history of Xerox in the 1970s and its need to make major changes in quality by the 1980s. Most of the remainder of the case details the step-by-step process by which Xerox created and designed the strategy called “Leadership Through Quality” to change its basic culture and its performance on quality from 1983-86.”  
Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=27959&R=490008-PDF-ENG&conversationId=1263544](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=27959&R=490008-PDF-ENG&conversationId=1263544)

<sup>107</sup> Case Description: “Focuses on Inditex, an apparel retailer from Spain, which has set up an extremely quick response system for its ZARA chain. Instead of predicting months before a season starts what women will want to wear, ZARA observes what’s selling and what’s not and continuously adjusts what it produces and merchandises on that basis. Powered by ZARA’s success, Inditex has expanded into 39 countries, making it one of the most global retailers in the world. But in 2002, it faces important questions concerning its future growth.”  
Source: [http://cb.hbsp.harvard.edu/cb/web/product\\_detail.seam?E=45234&R=703497-PDF-ENG&conversationId=1263621](http://cb.hbsp.harvard.edu/cb/web/product_detail.seam?E=45234&R=703497-PDF-ENG&conversationId=1263621)