

# THUNDERBIRD CASE BULLETIN

April 2023

For internal use only

Q2, 2023 Edition

## Update from the Case Series team

This has been an amazing semester for the Thunderbird Case Series. Those who attended the Case Series Workshop on Feb. 24 got to explore the art of case writing. Thanks to everyone who attended, both in person and online, for helping make the dynamic, interactive workshop such a success. You can find more details, as well as a link to watch a recording of the workshop—all four-plus hours of it, on Page 2 of this bulletin. You'll also get a sneak peek at the next workshop.

Looking ahead, all open spots for the case writing elective Professors Teagarden and Naidoo will be teaching this summer have been filled. The course, titled Agile Leadership and Case Writing (TGM 598), offers students a chance to explore and dissect some of the world's most exciting cases and speeches on agile leadership. They'll explore effective case writing and engage with leaders who join class sessions to share personal insights, all with the aim of learning to be better communicators and more effective leaders.

The Case Series team unfortunately must say goodbye to Vinayak Bansal, who graduates this spring. He will be leaving the Arizona desert to work in New York City. He accepted a post at KPMG, one of the the prestigious Big Four accountancy firms. KPMG

employs nearly 174,000 people worldwide and is known for its excellent staff development with pass rates higher than the industry standard.

"It was a wonderful learning experience at Thunderbird and developing the Global Mindset. I look forward to using my Global Business aptitude in the real world. I am so glad I was a part of the Thunderbird Case Series. The learning curve was invaluable," he said.

We're all so proud of him and his accomplishments. Take a big bite of the Big Apple, Vinayak!



**VINAYAK BANSAL** graduates next week and will begin work at KPMG in NYC.

Vinayak has been instrumental in transitioning the Case Series from Suzy Howell, who retired in January, to Arlene Hittle, the new Case Series manager and managing editor for *Thunderbird International Business Review*.

Arlene joined the team in March, following an extensive search. She rose to the top of a wide and varied applicant pool, and we're happy to welcome her. She comes to Thunderbird with more than 20 years of daily newspaper experience and five years with Big Brothers Big Sisters. You can learn more about Arlene and her background on Page 3.

Now Suzy can rest and enjoy her retirement!

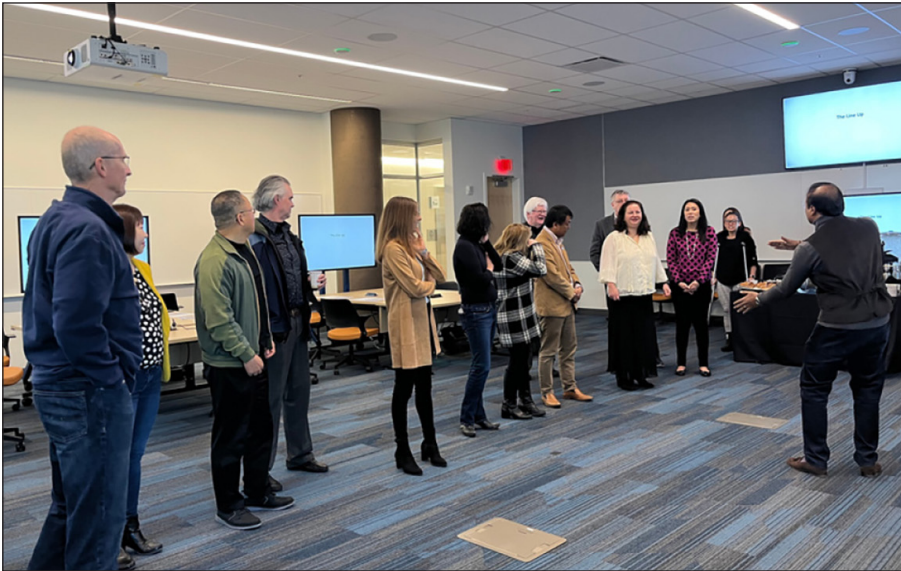
This bulletin also includes a peek at the whitepaper produced by the Thunderbird team on business innovation and the U.N. Sustainable Development Goals. Read more about that on Page 4. And on Page 6, you'll find some excellent case writing advice from one of our veteran case writers, Prof. Teagarden. As always, you can find some Case Series fun facts on Page 5.

No matter where you are on your case writing journey, we look forward to seeing your case ideas come to life.

**With support and thanks to all from the Case Series team, Euvin, Mary, Arlene, Vignesh and Vinayak**

# CASE SERIES LATEST NEWS

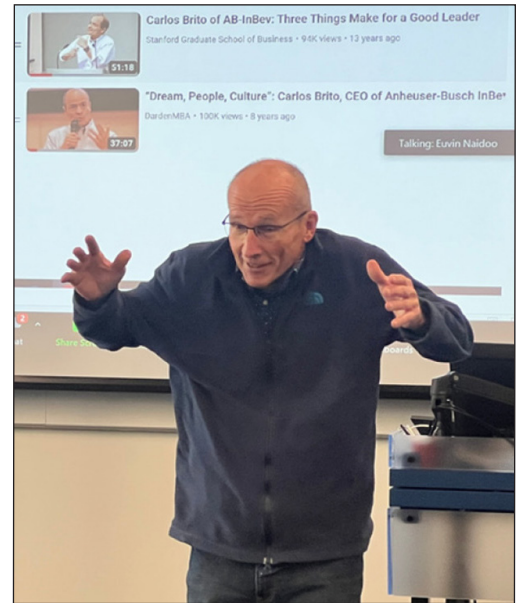
## February's workshop a rousing success



Catch the replay at this link:

<https://tinyurl.com/5n8mzuwh>

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Workshop participants carried on a lively discussion about what makes a case compelling. It must have a hook that pulls the reader in, some issue that readers have to consider, working together in class to solve the problem. Exhibits, including pictures and charts, help students understand the issue at hand, and the teaching note is a guide to help professors lead the in-class discussion.

Also of note: A case never tells the whole story. Instead, it should leave students wanting and/or needing to find out what really happened.

"The best thing we can do is write the cases that we teach," Prof. Mary Teagarden said during the discussion.



### Next workshop tentatively set for September/October 2023

Mark your calendars now. The Thunderbird Case Series team is beginning to plan for the next case writing workshop.

It's tentatively scheduled for a Friday in September or October, here at Thunderbird Global Headquarters.

This session will focus on best practices and examples of multimedia cases, including sharing our first crop of Thunderbird Digital Table Cases.

Come prepared to look at how Thunderbird is working to push the boundaries of case writing using new media and interactive pedagogical approaches.

Thank you to the ID Team at Executive Education and Mike Grasso's team for being pioneers and champions in helping us take on Dean Khagram's challenge to keep learning and pushing the boundaries of what we think is possible.

Look for more details in the next bulletin.

# CASE SERIES LATEST NEWS



**PARTICIPANTS IN THE FEBRUARY** Case Series Workshop learned by doing, discussing what makes a great case and much more.

**Workshop replay:**  
<https://tinyurl.com/5n8mzuwh>

**Password:** VN5\$BPMr

**Next workshop:**  
Sept./Oct. 2023



## Case Series team welcomes new manager

In the last bulletin, the Case Series Team bade a fond farewell to Suzy Howell, who retired after more than 31 years as managing editor of the *Thunderbird International Business Review*. She spent the last 10 or so years bringing out the best in cases submitted from around the world.

Now we have the privilege of introducing Arlene Hittle, who takes up the mantle. Arlene comes to Thunderbird after a lengthy career in journalism, having worked as a reporter and/or editor for daily newspapers in Indiana and Arizona from 1994 to 2017. That was the year she got fed up with journalism and took a job with the operations department at Yavapai Big Brothers Big Sisters in Prescott. She was still at YBBBS in fall 2022 when life threw her a curveball. Her significant other accepted a job in Tempe and because her YBBBS job wasn't remote-ready, she found herself unemployed.

What may have seemed like a spot of bad luck for Arlene ended up being good for both her and Thunderbird.

**You started work here on March 20. Tell us more about yourself.**

I graduated from the University of Evansville with a B.S. in journalism as the only student in the communications department with a job lined up. I was on the cops, courts and city council beat in Logansport, Ind., for a year before sliding into education reporting. Getting out into various classrooms to cover the innovative and interesting projects teachers did with their classes was the best part of the job.

When I moved to Arizona to take an education reporter position with the *Arizona Daily Sun* in Flagstaff, I did so without ever having been farther west than South Dakota. I



rented an apartment after looking at photos of it online (in 1999, before that was really a thing people did).

In 2001, I switched from reporting to copy editing and page design so I could focus more on writing fiction. When you write all day for work, the last thing you want to do in your "free" time is more writing. But because my ultimate goal had always been to write novels, I had to figure out how to make it happen.

**How are you settling in to your new job?**

I'm loving it so far. Not only does it allow me to get back to my journalistic roots, with editing and layout, but it also gives me a chance to explore publishing from a different side of the industry. I've gone from newspapers to nonprofits to, now, academia. (Fun side fact: I write romance novels, so I'm familiar with small press publishing and indie publishing.)

The time has flown as I learn new content management systems, refresh my memory on the workings of software like InDesign and get a handle on my new duties. Among them: managing submissions for TIBR and publishing new cases for TCS. Both promise to be engaging and, at times, daunting. There's so much to do!

The work also is shaping up to be a lot of fun. I look forward to exploring the world through new ideas presented in cases of all kinds, such as the one I just finished editing and laying out. It features an Ecuadorian snack maker that supports farmers using earth-friendly agricultural practices and aspires to become a lifestyle brand. It was a wonderful case for me to start with. The snacks' packaging is gorgeous. I'd definitely buy them if I saw them in MY store.

# FEATURED BULLETIN CASE

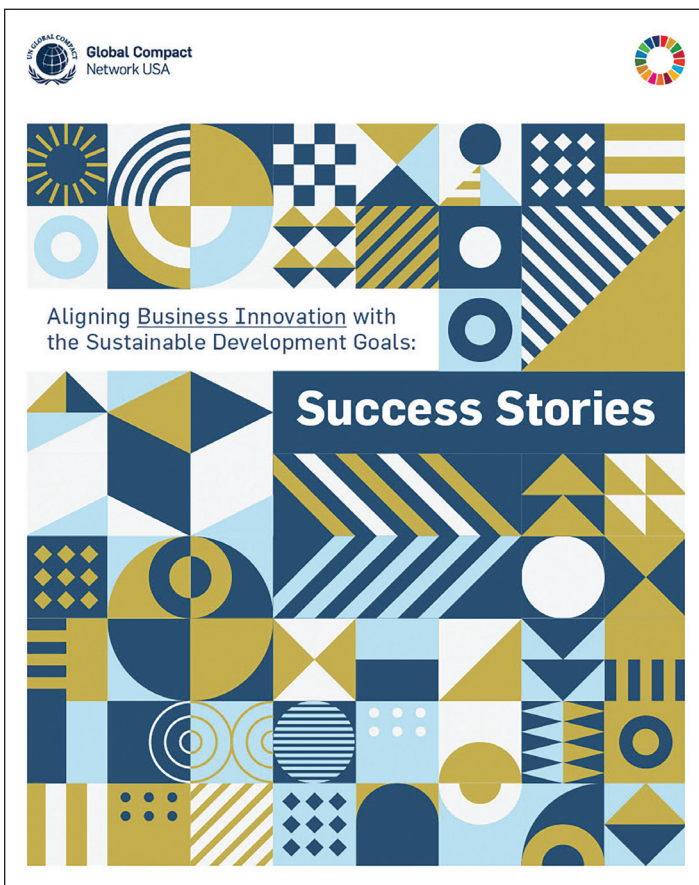


Shirley-Ann Behravesh, who holds degrees in management, finance, manufacturing engineering and sustainability, was part of the Thunderbird team that recently coauthored a whitepaper that was published with the UN Global Compact Network. Coauthors were Mary Teagarden, Eva Vázquez, Jonas Gamso, Joshua Ault, Kellie Kreiser, and Pedro Gorozpe.

Titled *Aligning Business Innovation with the Sustainable Development Goals: Success Stories*, the paper offers mini case studies of six companies' creative ways of addressing some of the UN's 17 SDGs.

The SDGs fall into three categories: social (such as eliminating extreme poverty and hunger, guaranteeing gender equality and providing access to clean water and sanitation); environmental (fostering sustainable communities and responsible consumption/production and taking effective climate action); and overarching goals that bridge environmental and social mandates (creating peace, justice and strong institutions and forging partnerships between businesses and governments to support the goals).

The six featured companies took some risks on innovative projects and were able to create positive societal and environmental impact, Dr. Behravesh said.



**COVER AND QUOTE** from *Aligning Business Innovation with the Sustainable Development Goals: Success Stories*.  
Read it here: <https://tinyurl.com/4dx8246>

## How did you get interested in ESG?

Sustainability more broadly, has always been an interest of mine. I grew up on a tropical island, and had a strong connection to nature. Officially, I was first exposed to the world of Sustainability in my position as Project Manager at the Cambridgeshire County Council in the UK — working to build a transition to adoption of renewable energies.

**Tell us about your innovative series for the UN Global Compact.**

It is now more important than ever for business to engage with the sustainable development agenda, as the world navigates new economic realities, ecological and energy transitions, and social transformations.

Crises such as inequitable health and education, climate change, and environmental degradation have become a **part of corporate risks and responsibilities**, but they also present opportunities to pioneer game-changing solutions.

# FEATURED BULLETIN CASE

The paper highlights the importance of collaboration and innovation to developing solutions for pressing sustainability issues. Using case studies, we detail the great work of young, diverse innovators who leveraged the support of like-minded individuals, T-Bird faculty, and their work mentors, to create and implement impactful, inclusive and comprehensive SDG initiatives.

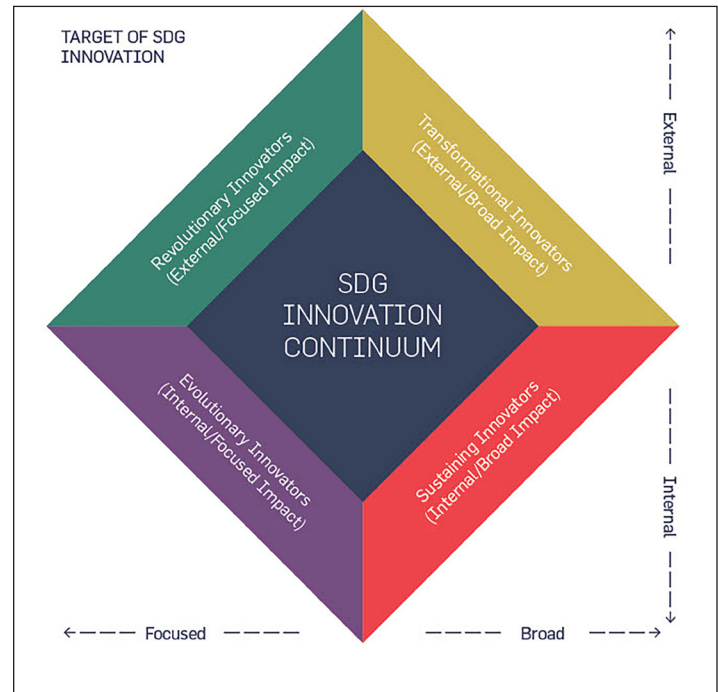
## What is your biggest takeaway from writing this whitepaper?

There is a misconception that sustainability initiatives are expensive, time-intensive, and complicated. While some of these might be true in some cases, a first step should always be giving employees the creative license to co-create solutions with a diverse set of internal and external colleagues. The most innovative solutions come out of these spaces.

## Of the six companies featured in the paper, which case study was the most interesting? Why?

One of the cases I spent some time on was with Owens Corning. Typically we think of older companies as being slow-moving, and too entrenched in the old ways of doing things, that innovation is rarely a thought. Owens Corning is just 7 years away from being 100 years old, and they have managed to position themselves as the sustainability leader in their industry. Before sustainability was even a thing, back in 2006, they were publishing CSR reports. Even so, after having achieved so much success in the sustainability space, they still ask — ‘what more can we do?’. A mark of a truly innovative company.

Do you have any other projects coming up that you'd



Source: "Aligning Business Innovation with the Sustainable Development Goals: Success Stories"  
**COMPANIES' POSITION** on the SDG Innovation Continuum can be affected by their SDG innovation goals, business realities, corporate culture, tolerance for change and presence of a champion inside the organization.

## like to share?

Working on diving more into Organizational Cultures and Sustainability. Also working with a new cohort of SDG Innovators currently.

## DID YOU KNOW?

The Thunderbird professor with the most published cases is **Michael H. Moffett**, Associate Professor of Finance (retired as of 2022). He appears as author or co-author on a total of 91 cases dating back to 1997. Two titles he published that year are *PepsiCo in Mexico: Anatomy of an Affiliate's Exposure* and *ZAPA Chemical and BuBa*. His most recent case, *The Drax Power Station and Biomass Energy*, was written with Greg Unruh and published early this year.

Runner-up is professor **Andrew Inkpen**, J. Kenneth and Jeanette Seward Chair in Global Strategy, who has 79 published cases. His titles also date back to 1997 and include *Seagram and MCA* and *Enron*. The Enron case was also published in Chinese. Prof. Inkpen's last published case was *Winds of Change at Hero Honda*, published in December 2022.

Source: Statistics gleaned from TCS spreadsheet

A case takes an average of **two months** to write and revise, according to online sources from Ivey Publishing and Harvard Business School.

# CASE WRITING COACHING CORNER

**D**r. Mary Teagarden, Professor of Global Strategy and Deputy Dean, Knowledge Enterprise at Thunderbird School of Global Management, is recognized and sought after in academic, corporate and government sectors for her teaching executive training and consulting. She has published more than 130 articles, books, chapters and case studies in outlets such as *Harvard Business Review*, *Asia Pacific Journal of Management* and *Organizational Dynamics*, and has shared her expertise on networks including CNN, MSNBC, FOX Business, ABC and NBC.

She is currently working on a case about Computer Aid International, an African company working to bridge the digital divide in developing countries worldwide. Today she shares some of her case writing expertise.



## **You've been a Thunderbird for a long time. Can you tell us about your connection to the school?**

I have deeply rooted connections. My dad was a flight instructor here in the 1940s and trained flyers from Asia, Europe and Canada. My son earned an EMBA from Thunderbird. I have had some form of professional engagement—consulting, training, teaching, administration since 1987.

## **How many cases do you estimate you've written?**

I've written over 35 teaching cases (30 published/5 lost their recency so I did not publish) and more than 60 research cases (part of my dissertation—some field

cases and some library cases).

## **How many countries have you taught cases in? Which ones?**

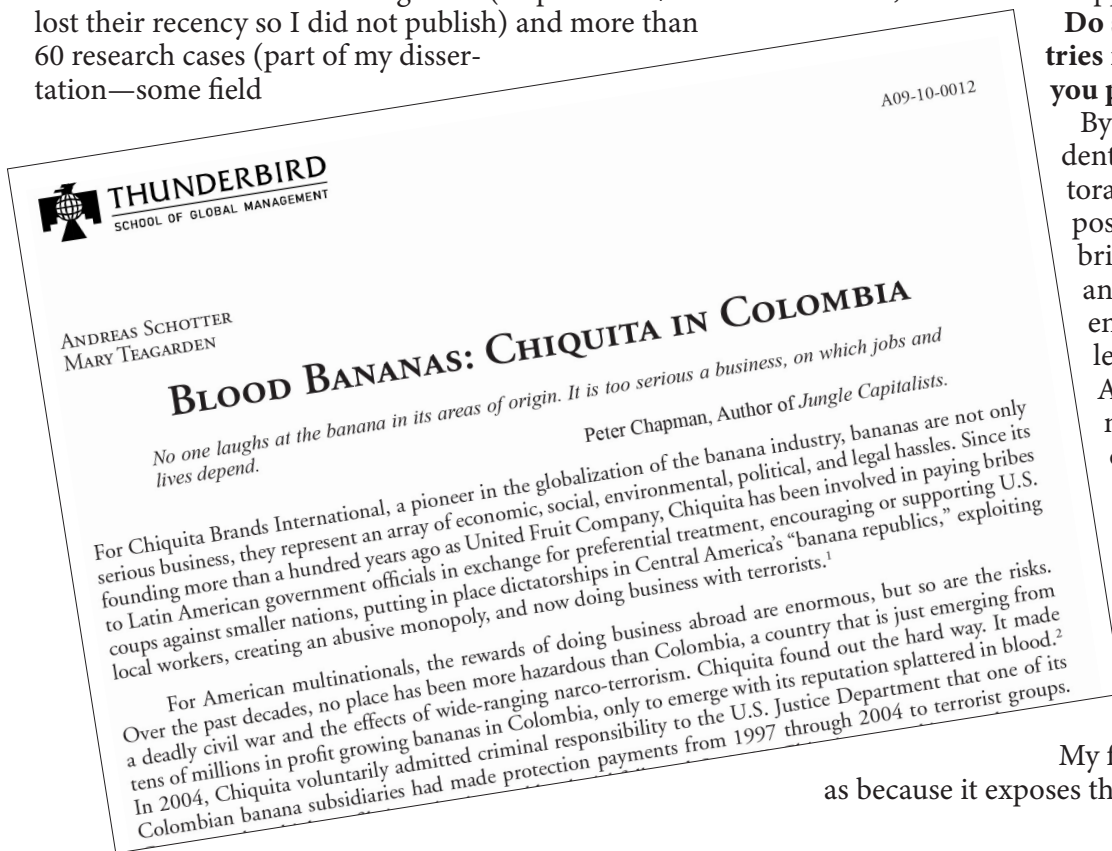
More than 30—USA, Canada, Mexico, Costa Rica, Guatemala, Columbia, Peru, Venezuela, England, France, Belgium, Netherlands, Italy, Czech Republic, Albania, Macedonia, Greece, Russia, Saudi Arabia, United Arab Emirates, India, Singapore, Malaysia, Vietnam, People's Republic of China, Taiwan, South Korea, Japan, Indonesia, Philippines, Australia.

## **Do students in different countries react differently to topics you present?**

By and large all levels of students—undergrad, grad, doctoral and executive—respond positively to case studies. They bring academic material to life and provide an action learning environment/context for the learner. In China, Japan, and Albania students tend to be more reluctant to engage in case discussions so I have to modify the way cases are taught. I encourage more group discussion and more team presentations of the groups' thoughts.

## **Is there one case or subject that stands out for you or is special?**

My favorite case is Blood Bananas because it exposes the complexity of international



# CASE WRITING COACHING CORNER

business and the dilemmas leaders can face. My second favorite is Cardinal Health because it documents the complexity of driving innovation and industry disruption—and the traps leaders can set for themselves. My third favorite is ThoughtWorks because it demonstrates how a creative small company that embraces new business models—in this case Agile—can disrupt an entire industry. I guess I have a soft spot for industry disruptors who navigate complex environments.

## What makes for a compelling case?

First, is it interesting; does it tell a compelling story—one that will keep the learner engaged. Second, does it reinforce the key concepts being taught. Third, will learners have to stretch as they engage with the case.

## What is the top tip you'd give someone just starting out with their first case?

I encourage anyone to start with writing the teaching note—at least learning objectives and intended outcomes. Doing this disciplines the case writing con-

tent and focus. Remember parsimony is good—you do not have to tell them everything you know. Be brutal editing your case. A good copyeditor can be your best friend!

I encourage a new case writer to write about something they know, something that can reinforce the core concepts they hope to demonstrate. Something they think learners will enjoy. Have a couple of trusted colleagues read and edit the case—it is ideal if the colleague has case writing experience. Do a trial run or two of teaching the case to make sure it will work in the classroom as you intend, and modify as necessary. I find case writing a very enjoyable process. It provides an opportunity to have a concrete impact on learners and colleagues who might use the case.

## In the pipeline ...

Here's a look at some of the cases in the works here at Thunderbird:

■ **Prof. Allen Morrison** is working on a series of cases about HeadHunter, HH.ru, the Russian version of LinkedIn. Titled *HeadHunter PLC: The Calm Before the Storm*, the series details the firm's successes and challenges since its inception in 2001.

■ **Prof. Mary Teagarden and Venghat Bhalaji Swaminathan**, Business Development Specialist, Executive Education, have submitted a case about Computer Aid International, a South African-based firm that aims to bridge the digital divide and reduce environmentally damaging e-waste in developing countries worldwide.

■ **Prof. Euvin Naidoo** is co-writing a tabletop case titled *The Journey of the Agile Manifesto* with **Glenda Whetten**, Director of Instructional Design for Thunderbird's Executive Ed program, and her team.

■ **Recently published** — *Kiwa: International Trade with a Purpose* by **Profs. Tom Hunsaker and Fabrizio Noboa**. The case focuses on Kiwa, a snack manufacturer that aims to lift Ecuadorian farmers out of poverty while encouraging earth-friendly agricultural practices. Its goal is to become a brand consumers count on for a healthy lifestyle, but it currently makes most of its money selling snacks in bulk and through private label agreements.

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**THUNDERBIRD**  
SCHOOL OF GLOBAL MANAGEMENT

MARY B. TEAGARDEN

## CARDINAL HEALTH INC. (A)

### Introduction

Bob Walter belted himself into his bright-red BMW two-seater and reflected on the pep talk that he was about to give to his top managers at the Embassy Suites, a five-minute drive away. Cardinal Health, the health care products-distribution industry merger and acquisition juggernaut, had hit an earnings speed bump. Cardinal was one of a handful of large U.S. companies that had achieved earnings-per-share growth in excess of 20 percent for 15 years straight. Nevertheless, Wall Street was questioning whether Cardinal Health, an empire that had grown through acquisition, could continue to grow at this remarkable rate using this approach. This doubt, coupled with recent questionable "stock crushing" accounting practices among wholesalers (including one of their own suppliers, Pfizer), was weighing down Cardinal's stock price despite their continued and healthy earnings growth.

Walter believed that recent blowups at major U.S. companies had occurred because of ultra-fast growth, high debt, and unfocused strategies, with Tyco serving as a prime example. Cardinal, by contrast, had grown gradually, had low debt (16 percent of total capital), and followed an acquisition program that never strayed from selling to pharmacies, hospitals, and pharmaceutical makers. Walter's fans, such as Peter Lynch, a Fidelity vice chairman, commented, "He's one of the best managers I've ever seen—and I've seen thousands" (Lashinsky). In 32 years, Walter had weathered other storms, and believed that this current speed bump was little more than the latest in a long line of "crises du jour" that included the Clinton health care plan of the early 1990s that had been expected to drive down drug prices, and the Internet threat of the late 1990s that had been expected to eliminate distributors altogether. Each time, Cardinal's stock rebounded. Walter believed the stock would rebound again as he repositioned Cardinal to compete beyond distribution into higher-margin services and pharmaceutical manufacturing.

### The Health Care Industry

Health care is a vital, dynamic industry with exciting prospects for future growth in the U.S. In 2006, health care expenditures totaled \$2.5 trillion, which was 16.3 percent of the U.S. gross domestic product, and growing at a rate faster than the GDP. The U.S. population age 65 and over was expected to double in the next 25 years. By 2030, almost one out of five Americans (some 72 million people) would be 65 years or older. The age group 85 and older was the fastest growing segment of the U.S. population. They represented 27 percent of the U.S. population in 2002, and forecasts were that their numbers would increase 13 percent, totaling 85 million by 2007. This consumer segment spent \$610 billion on health care, utilized 74 percent of all pharmaceuticals, represented 65 percent of hospital bed days, accounted for 42 percent of physician visits in 2002, and grew as forecasted. Europe and Asia showed similar trends (Summary Annual Report, 2001).

Thanks for reading!