### Appendix 3. Selected list of teaching case studies for family business education.

<table>
<thead>
<tr>
<th>Case Study</th>
<th>Source</th>
<th>Industry</th>
<th>Geography</th>
<th>Firm Age</th>
<th>Topic</th>
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</thead>
<tbody>
<tr>
<td>Adams Funeral Home</td>
<td>Poza &amp; Daugherty, 2004</td>
<td>Funerals</td>
<td>Georgia, USA</td>
<td>139</td>
<td>Strategic management, merger analysis, sales promotion</td>
</tr>
<tr>
<td>Alcoholes de Centroamerica, S.A.</td>
<td>NACRA - North American Case Research Association</td>
<td>Alcohol</td>
<td>Honduras</td>
<td>46</td>
<td>Entrepreneurship, conflicts management, family relationships, strategy</td>
</tr>
<tr>
<td>Anderson Steel Service, Inc.</td>
<td>Harvard Business School</td>
<td>Steel products</td>
<td>Arizona, USA</td>
<td>57</td>
<td>Organizational change, hotel operations, international management</td>
</tr>
<tr>
<td>Argentina Suites: A Case Study</td>
<td>NACRA - North American Case Research Association</td>
<td>Hotels</td>
<td>Buenos Aires, Argentina</td>
<td>26</td>
<td>Company management, family relationships</td>
</tr>
<tr>
<td>Atherton Clothing Company</td>
<td>Harvard Business School</td>
<td>Apparel, retail trade</td>
<td>California, USA</td>
<td>64</td>
<td>Succession, valuation of the company</td>
</tr>
<tr>
<td>Babbitt Ranches: Governance and Strategic Planning in a Family Business</td>
<td>Harvard Business School</td>
<td>Cattle ranching</td>
<td>Arizona, USA</td>
<td>127</td>
<td>Leadership, company management, succession, conflict and resolution</td>
</tr>
<tr>
<td>Bentington Industries</td>
<td>Harvard Business School</td>
<td>Consulting and Engineering services</td>
<td>England</td>
<td>81</td>
<td>Family interaction, organizational behaviour/leadership</td>
</tr>
<tr>
<td>Bhiwar Enterprises</td>
<td>Richard Ivey School of Business</td>
<td>Wholesale trade - non-durable goods</td>
<td>Kenya, Africa</td>
<td>n.a.</td>
<td>Succession plan, conflict management</td>
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<tr>
<td>Borrowing to Grow at Andrews Company</td>
<td>Poza &amp; Daugherty, 2004</td>
<td>Manufacturing</td>
<td>USA</td>
<td>n.a.</td>
<td>Family business in the next generations</td>
</tr>
<tr>
<td>Caso Conservas Diaz S.A.</td>
<td>Kellogg School of Management</td>
<td>Agriculture</td>
<td>Spain</td>
<td>n.a.</td>
<td>Family relations, succession, company's shareholders</td>
</tr>
<tr>
<td>Clemens Family Corporation</td>
<td>Iese Business School</td>
<td>Meat processing</td>
<td>Philadelphia, USA</td>
<td>93</td>
<td>Organizational change, family council, governance, board reorganization, succession</td>
</tr>
<tr>
<td>Donald Salter Communications, Inc.</td>
<td>Kellogg School of Management</td>
<td>Broadcasting, Newspaper publishing</td>
<td>Idaho, USA</td>
<td>90 ca.</td>
<td>Asset management, motivation and incentives, business valuation</td>
</tr>
</tbody>
</table>
### Appendix 3 (continued).

<table>
<thead>
<tr>
<th>Case Study</th>
<th>Source</th>
<th>Industry</th>
<th>Geography</th>
<th>Firm Age</th>
<th>Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ed's Dilemma: Succession Planning at Niagara Paving</td>
<td>Entrepreneurship: Theory &amp; Practice</td>
<td>Asphalt paving</td>
<td>Buffalo, New York, USA</td>
<td>31</td>
<td>Succession planning</td>
</tr>
<tr>
<td>Eu Yan Sang: Reviving a Traditional Family Business with Modern Business Principles</td>
<td>Stanford Business Case</td>
<td>Traditional Chinese medicine</td>
<td>Singapore</td>
<td>134</td>
<td>Growth, professionalization, family values, decline</td>
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<tr>
<td>Families, Fortunes, and Footwear. Reaching Out to the Fourth Generation of Brazil’s Lupo S.A.</td>
<td>Stanford Business Case</td>
<td>Apparel</td>
<td>Brazil</td>
<td>94</td>
<td>Succession, exit</td>
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<tr>
<td>Ford Motor Company’s Value Enhancement Plan</td>
<td>Harvard Business School</td>
<td>Automotive</td>
<td>Michigan, USA</td>
<td>110</td>
<td>Balance values of the family with the expectations of a modern day corporation, succession planning</td>
</tr>
<tr>
<td>Francisco de Narváez at Tía: Selling the Family Business</td>
<td>Harvard Business School</td>
<td>Retail trade</td>
<td>Argentina</td>
<td>80</td>
<td>Capital structure, cash, financial liquidity, business and shareholder relations</td>
</tr>
<tr>
<td>From Swords to Ploughshares</td>
<td>INSEAD</td>
<td>Storage and transport</td>
<td>Minnesota, USA</td>
<td>100 ca.</td>
<td>Family business exit (selling process)</td>
</tr>
<tr>
<td>George Barker</td>
<td>Harvard Business School</td>
<td>Real estate, rental &amp; leasing</td>
<td>USA</td>
<td>70 ca.</td>
<td>Management succession, conflict management</td>
</tr>
<tr>
<td>Goodwin Sporting Goods</td>
<td>Richard Ivey School of Business Foundation</td>
<td>Retail trade</td>
<td>USA</td>
<td>66</td>
<td>Leadership company management, performance evaluation, relationships</td>
</tr>
<tr>
<td>Graham Family and the Washington Post Co.</td>
<td>Harvard Business School</td>
<td>Newspaper publishing</td>
<td>District of Columbia, USA</td>
<td>80</td>
<td>Succession planning, retirement, conflict resolution</td>
</tr>
<tr>
<td>H.D. Chasen Company, Inc.</td>
<td>NACRA - North American Case Research Association</td>
<td>Industrial equipment</td>
<td>USA</td>
<td>61</td>
<td>Interpersonal communication, management succession, going public, family relationships</td>
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<tr>
<td>Iggy's Bread of the World</td>
<td>Harvard Business School</td>
<td>Baking &amp; bakeries</td>
<td>Massachusetts, USA</td>
<td>19</td>
<td>Succession planning</td>
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### Appendix 3 (continued).

<table>
<thead>
<tr>
<th>Case Study</th>
<th>Source</th>
<th>Industry</th>
<th>Geography</th>
<th>Firm Age</th>
<th>Topic</th>
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<tbody>
<tr>
<td><strong>Ireka Construction Berhad: A Chinese Family Business Goes Public</strong></td>
<td>Richard Ivey School of Business Foundation</td>
<td>Construction</td>
<td>Malaysia</td>
<td>46</td>
<td>Growth, organizational culture, restructuring</td>
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<tr>
<td><strong>J.R. Pierce, Inc.</strong></td>
<td>NACRA - North American Case Research Association</td>
<td>Pastry</td>
<td>Ohio, USA</td>
<td>n.a.</td>
<td>Process of going from a private to a public company, change management processes</td>
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<tr>
<td><strong>Keddeg company: Succession to the Next Generation of Small Business</strong></td>
<td>Kellogg School of Management</td>
<td>Aircraft</td>
<td>USA</td>
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<td>Family business succession planning</td>
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<td><strong>Kohler Co.</strong></td>
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<td>Manufacturing</td>
<td>Wisconsin, USA</td>
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<td><strong>Metal Benders Industries, Inc.: The Accidental Entrepreneur</strong></td>
<td>NACRA - North American Case Research Association</td>
<td>Metal industry</td>
<td>Maryland, USA</td>
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<td>Family business, entrepreneurship, succession, shareholder value, leadership</td>
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<td><strong>Nantucket Nectars</strong></td>
<td>Harvard Business School</td>
<td>Beverages</td>
<td>Massachusetts, USA</td>
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<td><strong>Nantucket Nectars: The Exit</strong></td>
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<td>Beverages</td>
<td>Massachusetts, USA</td>
<td>25</td>
<td>Strategic management, leadership, turnaround management</td>
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<td><strong>Northwest Security Services</strong></td>
<td>Graduate School of Business, Stanford University</td>
<td>Security Alarm services</td>
<td>Washington, USA</td>
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<td>Family business exit (selling process)</td>
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<td><strong>Ottawa Devices, Inc.</strong></td>
<td>Harvard Business School</td>
<td>Medical equipment &amp; devices</td>
<td>Canada</td>
<td>n.a.</td>
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<tr>
<td><strong>Outstanding Outsider and the Fumbling Family</strong></td>
<td>Harvard Business School</td>
<td>Food</td>
<td>Illinois, USA</td>
<td>n.a.</td>
<td>Bring new family members into a business, asset diversification, division of ownership</td>
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<td><strong>Pitcairn Family Heritage(R) Fund</strong></td>
<td>Harvard Business School</td>
<td>Fund investments</td>
<td>Philadelphia, USA</td>
<td>24</td>
<td>Change management, management succession, retirement, conflict of interests</td>
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<td><strong>Precista Tools AG</strong></td>
<td>Harvard Business School</td>
<td>Machine tools</td>
<td>Switzerland</td>
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<td>Succession, family ownership</td>
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<td><strong>Prudence and Audacity: The House of Beretta</strong></td>
<td>Harvard Business School</td>
<td>Arms</td>
<td>Brescia, Italy</td>
<td>487</td>
<td>Differences between controlled firms and held corporations, family firms' benefits and costs</td>
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</tbody>
</table>
## Appendix 3 (continued).

<table>
<thead>
<tr>
<th>Case Study</th>
<th>Source</th>
<th>Industry</th>
<th>Geography</th>
<th>Firm Age</th>
<th>Topic</th>
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<tbody>
<tr>
<td>Salvatore Ferragamo, Spa.</td>
<td>Harvard Business School</td>
<td>Shoes and leather goods</td>
<td>Italy</td>
<td>80 ca.</td>
<td>Family ownership, conflict and resolution, succession</td>
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<tr>
<td>Scholtes Waterservices</td>
<td>Richard Ivey School of Business Foundation</td>
<td>Horticultural</td>
<td>Holland</td>
<td>n.a.</td>
<td>Growth of the firm, adapt to new market</td>
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<tr>
<td>Sigma Motion, Inc.</td>
<td>Poza &amp; Daugherty, 2004</td>
<td>linear motion</td>
<td>Pennsylvania, USA</td>
<td>38</td>
<td>Changes and strategic planning, corporate governance, growth</td>
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<tr>
<td>Simon Salvage Case: A Case of a Family Business</td>
<td>NACRA - North American Case Research Association</td>
<td>Scrap metal</td>
<td>New Jersey, USA</td>
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<td>Succession, governance, communication, leadership</td>
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<tr>
<td>Smit's Company</td>
<td>NACRA - North American Case Research Association</td>
<td>Chocolate</td>
<td>Michigan, USA</td>
<td>113</td>
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<tr>
<td>Stevenson Industries</td>
<td>Harvard Business School</td>
<td>Pumps &amp; seals</td>
<td>Connecticut, USA</td>
<td>108</td>
<td>Transition in ownership, leadership</td>
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<td>The Agnellis and Fiat: Family Business Governance in a Crisis</td>
<td>Harvard Business School</td>
<td>Automotive</td>
<td>Italy</td>
<td>113</td>
<td>Governance, leadership, professionalization</td>
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<td>The Ambivalent CEO of the Construction Company</td>
<td>Poza &amp; Daugherty, 2004</td>
<td>Construction</td>
<td>Northeast, USA</td>
<td>n.a.</td>
<td>Growth's strategies despite of limited resources</td>
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<tr>
<td>The Cousins Tournament Case</td>
<td>Poza &amp; Daugherty, 2004</td>
<td>Electrical systems</td>
<td>California, USA</td>
<td>79</td>
<td>Succession, conflict management, management style, organizational culture</td>
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<tr>
<td>The Fojtasek Companies and Heritage partners: March 1995</td>
<td>Harvard Business School</td>
<td>Building materials</td>
<td>Texas, USA</td>
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<td>The Fudge Cottage</td>
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<td>Confectionery</td>
<td>Michigan, USA</td>
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<td>No abstract/key words available</td>
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<td>The Harilela Enterprises: An Indian Family Business in Hong Kong</td>
<td>Kellogg School of Management</td>
<td>Hotels</td>
<td>Hong Kong</td>
<td>91</td>
<td>Family ownership, mergers and acquisitions, partnerships, succession, financial strategy</td>
</tr>
</tbody>
</table>

**Appendix 3 (continued).**

<table>
<thead>
<tr>
<th>Case Study</th>
<th>Source</th>
<th>Industry</th>
<th>Geography</th>
<th>Firm Age</th>
<th>Topic</th>
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<tr>
<td>The Khalil Abdo Group</td>
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<td>Pharmaceuticals</td>
<td>Egypt</td>
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<td>Valuation of a business, business exit (selling process)</td>
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<tr>
<td>The New MBA</td>
<td>Poza &amp; Daugherty, 2004</td>
<td>Construction Sand and Gravel</td>
<td>Minnesota, USA</td>
<td>n.a.</td>
<td>Ownership, family employment, management, leadership, governance and succession</td>
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<td>The Resort in Pueblo Family</td>
<td>Cox Family Enterprise Centre</td>
<td>Hotel</td>
<td>Arizona, USA</td>
<td>n.a.</td>
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<td>The Son-In-Law</td>
<td>Poza &amp; Daugherty, 2004</td>
<td>Food (bakery)</td>
<td>Pennsylvania, USA</td>
<td>55</td>
<td>Succession issues during adverse events</td>
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<td>The Wen Group</td>
<td>Harvard Business School</td>
<td>Pharmaceuticals</td>
<td>Hong Kong</td>
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<td>Crisis management, conflict management, corporate governance, leadership</td>
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<td>W.S. Darley &amp; Co. - Sustaining Family Connections</td>
<td>Longenecker et al. (2011)</td>
<td>Fire-fighting and emergency services</td>
<td>Illinois, USA</td>
<td>105</td>
<td>Bringing family e business together, planning for succession</td>
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<tr>
<td>Westbrook Farm</td>
<td>NACRA - North American Case Research Association</td>
<td>Farm</td>
<td>Indiana, USA</td>
<td>n.a.</td>
<td>Investment evaluation, business decision making</td>
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<td>Weston Nurseries Inc.</td>
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<td>Florists</td>
<td>Massachusetts, USA</td>
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<td>Leadership strategy in a family business</td>
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<tr>
<td>Zobele chemical industries</td>
<td>Journal of Business Venturing</td>
<td>Chemical</td>
<td>Trento, Italy</td>
<td>94</td>
<td>Globalisation of a family firm, ownership and control</td>
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