

Bernelli Case Study Outline

1. Background
 - a. Product
 - b. Location
 - c. Geographical area
 - d. Context, governmental, environmental, family, legal, etc.
 - e. Value of company
 - f. Growth history
 - g. Market
2. Entrepreneur
 - a. Managerial style-
 - i. family members
 - ii. father/son
 - b. History
 - c. Chronological history of activities
 - d. Personality characteristics
 - e. Sacrifices
 - f. Family tree
 - g. Skills developed how?
 - h. Skills not developed?
 - i. Does the entrepreneur recognize these and address them
 - j. Fears?
 - k. Skills he/she excels in?
 - l. Work ethic
 - m. Previous jobs
 - n. Educational background
 - o. Other places visited
 - p. What inspired them to start a business
 - q. What makes them happy/successful? Definition?
3. Family Business
 - a. Succession planning? Future? Governance?
 - b. Leadership opportunities
 - c. Critical business decision/changes
 - d. Cycles
 - e. Financial ups and downs
 - f. Gender issues
 - g. What is the future of the business
 - h. How is that ensured?
 - i. Personal distractions about how the business is run
 - j. Ownership

- k. Marketing
 - l. How financed?
 - m. Other members of the family in business? Their roles?
 - n. Who are the customers?
 - o. How is conflict resolved?
 - p. Gender roles?
 - q. How are the generations taught the necessary skills?
4. The Environment
- a. Historical
 - b. Geographical
 - c. Financial
 - d. Outside Threats
 - e. Outside opportunities
 - f. Environmental
 - g. Economic

Teaching notes:

What would you do? Can he ensure the business will be carried on after his death? Advertising?

Best way to optimize equipment purchases? Is the business family divided in family?

Entrepreneurial vs. religious convictions when divided the business. What to do with non-present owner?

Bernelli Final Case Study Outline

- I. Case Synopsis (200 words)
- II. Back ground (500 words)
 - a. Description of products/services
 - b. History of the complain
- III. Individual Entrepreneur (1000-1500 words)
 - a. The Founders Early Childhood
 - b. Pre 12
 - c. Teen
 - d. 20's
 - e. Each decade until they started
 - f. His/her nature/characteristic/approach
 - g. Support system-family/friends
 - h. Cultural heritage, value, religion
- IV. Family Business

- a. Roles
 - b. Gender roles
 - c. The leader
 - d. Governance System
 - i. Conflict resolution
 - ii. Decision making
 - e. Communications
 - i. Shared vision
 - ii. Planning system
 - f. Seccession
- V. The environment (500-1000) Literature Review
- a. Describe geography
 - b. History of area
 - c. Economic
 - d. Education system and opportunity for learning
 - e. Religion
 - f. Government politics
 - g. Family structure
 - h. Local natural resource
 - i. Sociology/why of life(immigrant/cultural back)
 - j. Qualities