Required Reading

- **Capstone Student Handbook**: Found in BA495 course folder in D2L.

Supplemental Reading


Course Overview

- Effective strategies lead organizations to *stand out*—for what they do and how they do it. A pillar of Portland State University’s strategy is to develop students who can apply interdisciplinary learning to real world issues and become leaders of change. PSU’s University Studies program has frequently received international recognition for a distinguished undergraduate experience.

- The University Studies capstone course contributes to this strategic pillar by enhancing the lives of PSU seniors through service learning with partners in the community.

- The Business Strategy Capstone course is designed to provide an *integrative learning experience* along two dimensions: 1) as a *culminating experience* for the University Studies program at PSU; and 2) as a way for business students from different majors to integrate their knowledge and work together in the field with a community partner on pressing strategic issues.

Course Objectives

In this course, we will rely on business strategy frameworks to thoroughly analyze the client’s strategic issues and formulate recommendations. The strategy content and the client project have been selected so our students can experience the key goals of the University Studies Program (appreciation of the diversity of the human experience, communication, critical thinking, and social/ethical responsibility) while having a meaningful impact on the community.
Five Primary Goals of the Business Strategy Capstone Course

1. **Make a difference in the community.** This means being “all in” to serve your client, striving to produce recommendations for superior future performance.

2. **Appreciate human diversity.** In this course, we will focus on diversity issues that are central to business success: embracing cultural differences, addressing the needs of varied stakeholders, and working through differences across team members.

3. **Understand social and ethical responsibilities.** Businesses confront profound social and ethical issues in their pursuit of corporate social responsibility. Both through case analyses and the client work, you will need to weigh the social, environmental, and economic implications of your recommendations.

4. **Engage in effective communication.** Throughout your career, effective communication will be fundamental to your success, so we will practice both written and oral, and individual and team communication.

5. **Hone critical thinking skills.** Your client project will require you to thoroughly understand the client’s problem, analyze pertinent data, and formulate recommendations. Working with a client will make this process very real and exciting.

**Course Policy**

- **This class will be taught in a hybrid format,** containing lecture, discussion, and field work. **Everyone will be expected** to attend every class, contribute to class discussions, and visit the Client’s operations.

- **Laptop use during lecture is prohibited,** unless you are using the laptop to take notes. [If that is the case, I’ll ask that you email me your notes taken for the first 2 lectures.] **Exception:** on the days where we have client work, having a laptop within your group is helpful, but not essential. Cell phones, tables, and other mobile devices should be silenced and put away during class.

- **Teamwork:** Each student will be assigned to a team to work on a client project. Mutual respect, communication, and cooperation among team members are crucial for your success in delivering a sound final product to the client.
  - Within each team, members will alternate in serving “Team Leader” in weekly project tasks. The purpose of this is to cultivate contribution as well as communication, and to avoid dominance by one single member.
  - Your grades of all team-based work (i.e., team presentations and final report) are subject to the evaluation of your team members. **Don’t be a free-rider on the project. Strong contributions to projects, collaborative and respectful attitude, and regular attendance both in class and at team meetings are essential for optimal grading.** In situations where someone is consistently not sharing the responsibilities of the project, or delivering poor quality and/or late work to the group members, it is essential that others on the team help the person understand what issues exist and have everyone on the team brainstorm possible solutions. If team-related issue persists, step 1 is for all of us to meet and sort things out. Step 2 is a follow-up meeting to make sure things are better.

- **Class attendance:** Unexcused absences and lateness will affect grades. Absences will be excused only if you are sick or have a family emergency, or for valid professional reasons (e.g., job fair). I will ask for doctor’s note or other written proof if necessary. All other absences are unexcused. In any event, you must email me in advance of class to let me know your situation. If you miss five (5) or more classes, you will get an “Incomplete” grade.
Course Grading

**Client Project (group grading):**

- 25% Final Client Report with Strategic Recommendations
- 25% Client Project Presentations
  
  [5% External; 5% Internal; 5% Financials; 10% Final Presentation]

**Participation, Analysis, and Reflection (individual grading):**

- 5% Short write-ups posted to D2L
- 5% In-Class Presentation on Disciplinary knowledge
- 5% Top Management Team (TMT) critiques
- 10% Essay on UNST Studies Goals in this Capstone
- 5% Attendance
- 20% Discussion and Contributions in-class

[Excellent performance: makes high quality contributions in every class;
Good performance: participates often;
Fair performance: participates sometime;
Poor performance: does not participate.]

**Academic Honesty:** Students will uphold the honor code in all work associated to this course. All work must be original and non-original work should be appropriately referenced. Copying material from the internet or any other source without proper citation is considered plagiarism and cheating and will receive a failing grade.

For more information regarding PSU’s policies on behavior and academic honesty, please see: [http://www.pdx.edu/dos/psu-student-code-conduct](http://www.pdx.edu/dos/psu-student-code-conduct)

**Undergraduate Programs Office and Services**

The School of Business Administration provides Career & Academic Advisors to assist students in making the most of their collegiate experience. Career & Academic Advisors are trained to provide counsel in a wide range of issues. From selecting a business major and planning out classes to creating a job search strategy and writing resumes, Career & Academic Advisors are here to help students with all of their academic & career related questions. Business students are assigned an academic & career advisor who will assist them from orientation to graduation.

All SBA advisors are available by appointment, which must be scheduled in advance. Students can make an academic & career advising appointment throughout the year by visiting room 240 or calling 503-725-3712. Drop-in peer advising hours are available as well. Drop-in hours are held regularly throughout the week and are designed to help answer routine or simple questions. For more information about SBA advising and drop-in hours, please visit the School of Business website at [www.pdx.edu/sba](http://www.pdx.edu/sba) and click on Undergraduate, then Student Resources. Students with concerns about courses or the advising services provided by the Undergraduate Programs Office can contact the Director of the Undergraduate Programs Office via email at beckys@pdx.edu.

**Office of the Dean of Undergraduate Programs**

The Associate Dean of Undergraduate Programs oversees the execution of all undergraduate degrees and certificates in the School of Business. Appointments are available for students with confidential/sensitive issues related to their studies at Portland State. Please visit the front desk staff in suite SBA 650.
### Weekly Schedule

<table>
<thead>
<tr>
<th>Week</th>
<th>Topic</th>
<th>Case/Readings/Text</th>
<th>UNST Goals</th>
</tr>
</thead>
</table>
| 1. Mar 28 | **Introduction: Course & Client Projects** | **Readings**: Syllabus and Materials in course D2L sites  
**Project Assignment**: Read:  
(1) The clients’ project overview;  
(2) The Syllabus;  
(3) The Capstone Student Handbook:  
(4) Materials on the Business Capstone website:  
  [http://www.pdx.edu/sba/capstone](http://www.pdx.edu/sba/capstone) | 1. Inquiry and Critical Thinking  
2. Communication |
| 1. Mar 30 | **Meet the Clients** | **Guest speaker**: manager/founder from client organization  
**Readings** (in D2L):  
1. material about clients;  
2. Business Plan components  
(1) Prepare questions for the client related to their project overview.  
(2) Research all of the clients online (their websites; competitor websites; etc.)  
(3) Take notes on the overview provided by the client, who will describe the pressing issue that you will address as part of your business plan and strategic recommendations deliverables.  
[At end of class, you will specify your preferences regarding the clients. I will assign you to a client team to strive for functional diversity.] | 1. Inquiry and Critical Thinking |
| 2. Apr 04 | **Team Formation & Scope of Work (SOW)** | **Readings** (in D2L):  
1. Client’s scope of work  
2. Groups are Fun and Not Fun.pdf  
3. Creating Cultural Connections.pdf  
4. Sample Scope of Work | 1. Inquiry and Critical Thinking |
| 2. Apr 06 | **Talk to Your Client** | **FIELD DAY (No Class)**: With your team, meet with your client  
(1) Bring a list of questions (>30 questions)  
(2) If available, walk through financial statements of client.  
(3) Outline key performance metrics related to your team’s scope of work.  
(4) Research important trend data affecting client’s business. | 1. Inquiry and Critical Thinking  
2. Communication |
| 3. Apr 11 | **Develop & Finalize Your SOW** | With your team, finalize Scope of Work, due to D2L dropbox by end of day | 1. Inquiry and Critical Thinking  
2. Communication |
| 3. Apr 13 | **Evaluating External Opportunities & Threats** | **Text**: Ch3. External Analysis  
**Action**: Marketing/Advertising students share disciplinary knowledge pertained to market analysis | 1. Diversity of Human Experience |
4. Apr 18 | Presenting Your External Analysis  
**Project:** Evaluate the external factors (e.g., PESTEL, the “6” forces, or your peers’ presentation) that influence the Client’s business by drawing on pertinent data. Analyze the biggest threats and the greatest opportunities, and your recommendations given these factors.  
(All team members should present; this is a graded presentation.)  
Each team will prepare their external analysis in a PPT slide deck (before class post to D2L).  
- Focus on the external factors that are the MOST pertinent to the client.  
- Provide data to back up your analysis. Use data at the level of the client. (Include citations to the data and research.)  

1. Inquiry and Critical Thinking  
2. Communication

4. Apr 20 | Understanding Business-level Strategy  
**Text:** Ch6. Business Strategy: Differentiation, Cost Leadership, and Integration  
**Reading:** 1. Lack of peripheral vision – How Starbucks failed in Israel, *African Journal of Marketing Management*  
**Action:** SRLM students share disciplinary knowledge pertained to business strategy

1. Critical Thinking  
2. Diversity of Human Experience

4. Apr 25 | Business Model Analysis  

1. Critical Thinking

4. Apr 27 | Evaluating a Firm’s Strengths & Weaknesses  
**Text:** Ch4. Internal Analysis: Resources, Capabilities, and Activities  
**Action:** Management/Leadership/HR students share disciplinary knowledge pertained to internal analysis

1. Inquiry and Critical Thinking  
2. Communication

6. May 02 | Presenting Your Internal Analysis  
(All team members should present; this is a graded presentation.)  
(1) Identify the 5 key resources that would lead to capabilities and ultimately core competencies? Analyze by using the VRIO framework.  
(2) Assess how these core competencies will lead to competitive advantage for your client by doing a SWOT matrix that leads to strategic recommendations.  
(3) Assess your client’s SWOT matrix relative to 1 close competitor. How should you refine your recommendations based on the SWOT matrix given this assessment?

1. Inquiry and Critical Thinking

6. May 04 | Evaluating Firm Performance  
**Text:** Ch5. Competitive Advantage & Firm Performance  
**Readings** (skim it): “How to read financials_Merrill Lynch”  
**Action:** Finance/Accounting students share disciplinary knowledge pertained to financial analysis / projection.

1. Inquiry and critical thinking

7. May 09 | Talk to Your Client, Again!  
**FIELD DAY: no class: meet with client this week**  
**Project:** go over your proposed recommendations; talk about remaining issues.

1. Community Contribution  
2. Critical Thinking  
3. Communication
<table>
<thead>
<tr>
<th>Date</th>
<th>Activity</th>
<th>Text</th>
<th>Course Competencies</th>
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<tbody>
<tr>
<td>7. May 11</td>
<td>Understanding Strategic Entrepreneurship</td>
<td>Ch7.</td>
<td>1. Inquiry &amp; Critical Thinking</td>
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<td></td>
<td><strong>Project:</strong> With your team, complete the list of start-up costs (if applicable), Balance Sheet (if useful), Cash Flow, and pro-forma Income Statement for the next 5 years, as well as the Breakeven analysis, using the Client’s data.</td>
<td></td>
<td>2. Inquiry and Critical Thinking</td>
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<td></td>
<td>(All team members should present; graded presentation.)</td>
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<td>3. Communication</td>
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<tr>
<td></td>
<td>(1) Be prepared to present your client’s start-up costs (as applicable), and financial statements. Note that it is recommended that you create monthly entries for the first year in the income statement and cash flow statement, and then annual entries for the subsequent 4 years. Create a PPT slide deck (before class post to D2L).</td>
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<td>(2) How do your emerging recommendations play out in the financials?</td>
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<td></td>
<td>Do not present whole spreadsheets; rather, excerpt key sections and summarize the key data series in charts and graphs.</td>
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<td>8. May 16</td>
<td>Develop &amp; Polish Your Client’s Business Plan</td>
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<td>1. Ethics and Social Responsibility</td>
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<td><strong>Reading:</strong> 1. How to Write a Great Business Plan</td>
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<td>2. Communication</td>
</tr>
<tr>
<td>9. May 23</td>
<td>Work on Final Deliverables</td>
<td></td>
<td>1. Diversity of Human Experience</td>
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<td></td>
<td><strong>Project:</strong> In class, teams will work on final report, final presentation, and any remaining issues. Professor will check in with each team.</td>
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<tr>
<td>9. May 25</td>
<td>Run through of Final Presentation</td>
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<td></td>
<td><strong>Note:</strong> Report of Your Learning Experience due by 11:00pm.</td>
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<tr>
<td>10. Jun 01</td>
<td>Presentation to Client (business attire)</td>
<td></td>
<td>2. Inquiry and Critical Thinking</td>
</tr>
<tr>
<td>11. Jun 08</td>
<td>Presentation to Client (business attire)</td>
<td></td>
<td>3. Communication</td>
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<td><strong>Final Report Due for All Teams (11:59pm)</strong></td>
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</table>

(post Final Report into D2L)
Appendix 1

Client Project: Business Plan and Strategic Recommendation

Working with an interdisciplinary team, you will develop a business plan (OR RELATED DELIVERABLE) for the external Client around a pressing strategic issue identified by the Client. After the second class session, you will be assigned a team with members who represent a cross-section of the business majors.

The team will produce a written report and a final presentation that make clear recommendations depending on the Client’s scope of work. Sample business plan can be accessed in relevant folder within the D2L course folder.

Project Deliverables:

- See weekly assignments in Appendix 2.
- The final written report should be approximately 40 pages NOT including charts, graphs, resumes, tables, or outlines—please put those after the text, but explain and reference them in the text. Reports should be typed and organized using subheadings. 12 point font, double spaced with subheadings.
- Refer to the sample business plan on D2L, within the course folder.
- Make sure to cite all data and sources for quotes, chart data, etc. Follow the convention of: (Last name of source, date) in the text and use citation examples in BA495 library resource page for full citations in endnotes.
- Concepts from the course should be incorporated into all project deliverables as appropriate.
- Some of the richest recommendations come through primary research. Each team is expected to contact at least 3 organizations central to the scope of work. Please incorporate content into report and cite in the bibliography.

Deliverables during Finals Week:

1) The final PowerPoint presentation needs to be posted to D2L before the final presentation to the client.

2) On the designated final exam day, post the final report and any helpful spreadsheets to D2L.
Appendix 2

Short Write-ups: Asking the Right Questions

UNST goal: Inquiry and Critical Thinking; Communication

The weekly short write-ups will start from Week 3 (4 out of 5 write-ups will be counted), and:

- **Due by 11:00PM on Tuesdays. Late submissions are not accepted.**

The purpose of these postings is to have you step back and conduct critical thinking about the connections between the course material and your community project. Doing so will allow you to practice applying strategy constructs to real-world situations. You should become masterful at relating strategic management theory, concepts and frameworks to business practice.

Ask **THREE** questions based upon the reading (textbook, supplementary materials), focusing on “what”, “why” and “how”, and then provide your answers or your own interpretations. Your questions should be coherent, thoughtful, and show your critical thinking.

1. For the “what” question, focus on a concept, an argument, a phenomenon or a finding from this week’s reading that is interesting, provocative, or surprising to you.
2. For the “why” question, explain why the topic identified in your “what” question is important to the strategic analysis of the firm.
3. For the “how” question, critically think how the answers to your “what” and “why” questions are relevant to the client project you are working with.

<table>
<thead>
<tr>
<th>Due Dates of weekly write-ups</th>
<th>Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/12/2016: 11:00pm</td>
<td>External analysis of a firm</td>
</tr>
<tr>
<td>04/19/2016: 11:00pm</td>
<td>Business-level strategy</td>
</tr>
<tr>
<td>04/26/2016: 11:00pm</td>
<td>Internal analysis of a firm</td>
</tr>
<tr>
<td>05/03/2016: 11:00pm</td>
<td>Financial analysis of a firm</td>
</tr>
<tr>
<td>05/10/2016: 11:00pm</td>
<td>Strategic entrepreneurship</td>
</tr>
</tbody>
</table>
Appendix 3

Share Your Disciplinary Knowledge

UNST goal: Inquiry and Critical Thinking; Communication; Human Experience Diversity

Throughout the term, students from each discipline will work as a team, and give a lecture on topics pertained to our course content. What you are required to do: 1) Synthesize the disciplinary knowledge related to the topic of that class session; 2) Develop your synthesis into a power point presentation; 3) Present to the entire class. Depending upon the size of a team, every student will take 3-5 minutes of the lecture time.

The purpose of this assignment is to: 1) gain a deep understanding about the connection of your disciplinary knowledge with the strategic management perspective; 2) practice the capability to tell what you have learned; 3) appreciate the diverse yet related business issues; and 4) identity the rich connections between these various business issues and the client projects.

Note: You will decide what/how you are going to lecture, as long as it is pertained to the topic. You can elaborate on a tool, a framework, a business case, or an overarching synthesis of all related subjects you have learned within your major. Whichever direction, think yourself as an instructor, and be aware of your audience’s knowledge background.

Some sample questions for you to think about in preparing your lecture:

Marketing and Advertising: 1) Aside from the PESTEL model, what tools are there that the marketing field uses to conduct market environmental analysis; 2) What are the challenges that a small business or a new startup would encounter in its external environment? 3) What resources or strategies that a small business or a new startup can deal with these challenges?

Supply and Logistics: 1) How can a firm’s supply and logistics help a firm to calve out a sustainable business level strategy? 2) What are the challenges in increasing efficiency in supply and logistics? 3) How can a small business or a new venture design its supply and logistics from the very beginning?

Management/Leadership and HR: 1) How can a firm acquire, develop, and maintain human capital? 2) For a small business or a new venture, how can it design, assign, and implement roles for different personnel? 3) What resources can a small business or a new venture leverage in this effort?

Finance and Accounting: 1) How can a small business or new venture, which has no or limited financial history, project its financial situation? 2) What methods are there that help to guesstimate the missing financial information? 3) If we are to conduct financial analysis for a non-profit organization, what tools and methods can we leverage?

<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
<th>Students from</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/13/2016</td>
<td>External analysis of a firm</td>
<td>Marketing; Advertising</td>
</tr>
<tr>
<td>04/20/2016</td>
<td>Business-level strategy</td>
<td>Supply and Logistics</td>
</tr>
<tr>
<td>04/27/2016</td>
<td>Internal analysis of a firm</td>
<td>Management and Leadership; HR Management</td>
</tr>
<tr>
<td>05/04/2016</td>
<td>Financial analysis of a firm</td>
<td>Finance; Accounting</td>
</tr>
</tbody>
</table>
Appendix 4

Report on Your BA495 Learning Experience

This exercise is an opportunity for you to synthesize what you have learned since you joined the School of Business at PSU and to demonstrate your problem solving abilities by applying the knowledge that you have gained through your coursework. Please write a 4-5 page report addressing all of the following points:

1. Identify and describe the major problems or challenges that your BA495 client* faces.
   a. What are the client’s problem(s)?
   b. What process did you go through to determine the problem(s)?
   c. What are the main causes of the problem(s)?

2. Think about the courses that have had the most impact on you during your undergraduate degree.
   a. What elements from these courses (i.e., theories, frameworks, ideas, activities, tools, formulas, diagrams, etc.) are most relevant to addressing the problems faced by your client? Why?
   b. Please show how you would apply, adapt, and combine distinct elements of at least 2 of these courses to solve your client’s problem(s) described above. How would you put the pieces of analysis from distinct courses together to construct a recommendation? Please, be as specific as possible and choose an appropriate format to construct your answer (e.g., charts, graphs, tables, etc. as necessary).

3. How did you work with others in your team to draw upon and integrate their functional expertise to implement your recommendation in 2b?

4. Please explain how your individual learning has evolved while being enrolled in SBA courses to enable you to solve your client’s challenges. Do you feel better prepared after enrolling in SBA courses to address complex challenges (e.g., working with: uncertainty, many variables, interdependencies, discrepancies, etc.)? Why or why not?

*Note: you may choose any of the clients in your section to complete this assignment.
Appendix 5

Discussion & Contributions

UNST goal: Inquiry and Critical Thinking
UNST goal: Communication

A central part in developing your inquiry, critical thinking and communication skills will be active and thoughtful contributions to the class discussion. Your contributions will be critical in refining your managerial and presentation skills, as well as to your learning and the learning of your classmates, so everyone is expected to participate in each class session. I usually ask for volunteers, but I also cold call people throughout the class session.

In evaluating class contributions, I consider both quality and the frequency of contribution, but I weigh quality more heavily. In assessing quality, I consider the following dimensions:

- Is the student taking risks?
- Is the student creatively trying to experiment with strategic thinking and visioning?
- Does the comment simply repeat facts from the case, or does it provide analysis that adds to our understanding of the case and its broader implications?
- Does the comment fit well into the flow of the discussion? Is it linked to the comments of others?
- Does the comment trigger others to enter the analysis?
- Does the comment link the case material effectively to the material from the textbook?
- Does the comment reflect creative thinking, perhaps by tying together multiple viewpoints or tying back to material covered previously in the course?
- Is the comment presented in a clear, compelling manner or is it confusing, repetitive or contradictory?
- Is the comment delivered in a respectful, constructive tone?

In making my overall assessment of class participation, the overarching criterion is “How significantly did this student’s contributions add to the learning of the class as a whole?”
Appendix 6: Grading Rubrics

1. Grading Rubric for External Analysis

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Superior (90% to 100%)</th>
<th>Good (80% to 89%)</th>
<th>Under-developed (70% to 79%)</th>
<th>Unacceptable (69% or below)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pertinent research at the level of the client used to construct PESTEL, 6 Forces Dimensions, and/or framework from peer presentation</td>
<td>The research was all at the level of the client; The data/research informed the most pertinent dimensions of PESTEL, 6 Forces, or framework from peer presentation</td>
<td>Not all of the research was at the level of the client; the dimensions of PESTEL, 6 Forces, or framework from peer presentation had loose ties to the data/research</td>
<td>Limited data/research presented and did not inform the dimensions of PESTEL, 6 Forces selected, or framework from peer presentation</td>
<td>Either data/research were deficient or PESTEL, 6 Forces, or frameworks from peer presentation were neglected</td>
</tr>
<tr>
<td>Biggest Threats and Opportunities drawn from PESTEL, 6 Forces analysis, and/or peer presentation</td>
<td>Threats and Opportunities convincingly developed from PESTEL and/or 6 Forces analysis, or framework from peer presentation</td>
<td>Threats and Opportunities presented but connection to PESTEL and/or 6 Forces, or framework from peer presentation not thorough</td>
<td>Limited development of Threats and Opportunities and few—if any—ties to PESTEL and/or 6 Forces analysis, or framework from peer presentation</td>
<td>Missed the mark: Threats and Opportunities not developed</td>
</tr>
<tr>
<td>Presentation: professional, clear, well researched, practiced, uncluttered slides, passionate</td>
<td>Whole team went for it: Well prepared with research, great flow, clear slides, engaged audience</td>
<td>Good overall, but needed more depth and polish</td>
<td>Needed more practice, some slides hard to understand, heart not really in it</td>
<td>Team did not work together to construct a coherent and smooth-flowing presentation</td>
</tr>
</tbody>
</table>
## 2. Grading Rubric for Internal Analysis

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Superior (90% to 100%)</th>
<th>Good (80% to 89%)</th>
<th>Underdeveloped (70% to 79%)</th>
<th>Unacceptable (69% or below)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deliverables</td>
<td>All steps well done; recommendations in SWOT well-reasoned</td>
<td>Completed the steps but needed more depth; recommendations in SWOT needed more</td>
<td>Cursory attempt at steps and recommendations</td>
<td>Neither steps completed nor clear recommendations crafted</td>
</tr>
<tr>
<td>1-2 core competencies → 5 resources or capabilities → clients has or</td>
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<tr>
<td>needs → why VRIO; SWOT with the S=1-2 core competencies, and O &amp; T =</td>
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<tr>
<td>previous presentation with recommendations in middle</td>
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<tr>
<td>Client’s SWOT matrix vs. one key competitor’s: will your recommendations</td>
<td>Thorough comparison of SWOTs and convincing analysis of recommendations</td>
<td>SWOTs compared and recommendations assessed relative to competitor, but needed</td>
<td>Comparison of SWOTs not clear and justification of recommendations incomplete</td>
<td>Neither SWOT comparison nor recommendation assessment completed</td>
</tr>
<tr>
<td>lead to competitive advantage?</td>
<td></td>
<td>more depth</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Presentation: professional, clear, well researched, practiced,</td>
<td>Whole team went for it: Well prepared with research, great flow, clear slides,</td>
<td>Good overall, but needed more depth and polish</td>
<td>Needed more practice, some slides hard to understand, heart not really in it</td>
<td>Team did not work together to construct a coherent and smooth-flowing presentation</td>
</tr>
<tr>
<td>uncluttered slides, passionate</td>
<td>engaged audience</td>
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3. Grading Rubric for Financial Analysis

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Superior (90% to 100%)</th>
<th>Good (80% to 89%)</th>
<th>Underdeveloped (70% to 79%)</th>
<th>Unacceptable (69% or below)</th>
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<tbody>
<tr>
<td>Captured financial implications of recommendations in a clear and compelling way; told a story with the data; explained most important assumptions</td>
<td>Financial implications of all key recommendations analyzed thoroughly; most important assumptions explained</td>
<td>Decent coverage of implications of recommendations and a good start on the analysis; some assumptions explained</td>
<td>Touched on most implications of recommendations but very little analysis and not clear on critical assumptions</td>
<td>Limited treatment of implications of recommendations and assumptions</td>
</tr>
<tr>
<td>Appropriate financials presented (depends on client but generally 5 years of pro forma income statement, cash flow, breakeven analysis)</td>
<td>All pertinent financials presented</td>
<td>The majority of pertinent financials presented</td>
<td>Only a start on the most pertinent financials</td>
<td>Missed the mark: hardly any financials presented</td>
</tr>
<tr>
<td>Presentation: professional, clear, well researched, practiced, uncluttered slides, passionate</td>
<td>Whole team went for it: Well prepared with research, great flow, clear slides, engaged audience</td>
<td>Good overall, but needed more depth and polish</td>
<td>Needed more practice, some slides hard to understand, heart not really in it</td>
<td>Team did not work together to construct a coherent and smooth-flowing presentation</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Elements</th>
<th>Outstanding</th>
<th>Adequate</th>
<th>Poor</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Connection of concepts</strong></td>
<td>Comprehensively synthesizes concepts by combining examples, facts or theories from more than one field of study or perspective.</td>
<td>Sufficiently connects examples, facts or theories from more than one field of study or perspective.</td>
<td>Does not appropriately connect examples, facts or theories from more than one field of study.</td>
</tr>
<tr>
<td><strong>Transfer of skills &amp; theories</strong></td>
<td>Comprehensively adapts and applies skills, abilities, theories or methodologies gained in one situation to new situations.</td>
<td>Sufficiently adapts and applies skills, abilities, theories or methodologies gained in one situation to new situations.</td>
<td>Does not apply skills, abilities, theories or methodologies gained in one situation to new situations or methodologies gained in one situation to new situations in relevant ways.</td>
</tr>
<tr>
<td><strong>Integrated communication</strong></td>
<td>Utilizes a format, language, or medium that enhances the integration of ideas, making clear the interdependence of language, meaning and expression.</td>
<td>Chooses a format, language, or medium that connects content and form, with an appropriate awareness of purpose and audience.</td>
<td>Does not use a format, language or medium that connects content and form.</td>
</tr>
<tr>
<td><strong>Self-reflection</strong></td>
<td>Comprehensively evaluates how individual learning evolves over time to address complex contextual factors.</td>
<td>Sufficiently evaluates how individual learning evolves over time to address complex contextual factors.</td>
<td>Insufficiently evaluates how individual learning evolves over time to address complex contextual factors.</td>
</tr>
<tr>
<td><strong>Writing Style</strong></td>
<td>Uses language that skillfully communicates meaning to readers with clarity and fluency; and is virtually error-free.</td>
<td>Uses straightforward language that generally conveys meaning to readers. The language has a few errors.</td>
<td>Uses language that sometimes impedes meaning because of errors in usage. Writing lacks organization and fluency.</td>
</tr>
</tbody>
</table>