

Final Assignment

Case: The Real World

The final assignment is to create a strategic proposal, in four stages, for either

- your current employer, at the company level,
- your current functional team (department) within your company, or
- IBS, AB (<http://www.ibs.net/> and <http://www.ibsus.com>), an ERP/SCM vendor
 - This version of the assignment can be done in teams up to 2.

Note: you must select IBS,AB if you are not currently employed, or have not been employed in the last 6 months

Guidelines:

- Format: Powerpoint
 - Powerpoint: Less than 20 “main body” slides; cover slide and backup slides (i.e. appendices) are encouraged
 - Bulletized lists/items, tables and charts encouraged
 - Brevity, without sacrificing specificity, is highly encouraged.

Be sure to include your name(s) on the cover slide.
Be sure to include your name(s) in the filename; Preferred format: #<n>_<name1>_<name2>.ppt
- Outline:
 - Main Body
 1. Question for focus/scope
 2. Market Overview
 3. Analysis
 4. Alternatives
 5. Criteria
 6. Analysis of Alternatives
 7. Recommendations
 8. Risks and Mitigations
 - Appendices
 9. Goals and Objectives for the firm (and division, and department, as necessary)
 10. Others, as needed or possible (e.g. Additional data re: market, customers, competition, product, etc. provided as necessary; Financial and other Tactical Considerations)

Deliverable Stages:

1. By January 26th, provide slides for:
 - Strategic Q&A
 - Appendix: Goals and Objectives
2. By February 2nd, incorporate comments from previous assignment and provide additional slides for
 - Market Overview and Analysis Sections; use of one or more analysis models is optional
3. By February 16th, incorporate comments from previous assignment and provide additional slides for
 - Alternatives, Criteria and Analysis of Alternatives Sections
4. By March 2nd, provide complete assignment by 5p.m.

Assessment Model for Strategic Proposal:

The following criteria will be used to assess student’s ability to identify key, required strategic proposal components, to understand one of strategic planning’s common tools, and to apply the model and tools to a common business situation.

Criteria	Exemplary	Competent	Developing
Organization and Professionalism	<ul style="list-style-type: none"> • Presentation follows the template provided • Presentation from Strategic Question to Risks and Mitigations is < or = 20 slides • Appendices used as necessary • Presentation is clear & logical • Style & format is simple and clear with appropriate grammar, fonts, font sizes, graphics, charts, etc. • Conclusions/summaries provided per slide 	<ul style="list-style-type: none"> • Presentation does not follow the template provided – one section missing • Presentation from Strategic Question to Risks and Mitigations is < or = 20 slides • Presentation is clear and logical • Style and format is simple, but grammar, fonts, font sizes, graphics, charts, etc. are incorrect, unclear, sloppy, etc. 	<ul style="list-style-type: none"> • Presentation does not follow the template provided; sections missing or out of sequence • Presentation from Strategic Question to Risks and Mitigations is << or >> 20 slides • Presentation lacks logical flow of reasoning • Style and format is overdone and difficult to read and/or print
Strategic Question	<ul style="list-style-type: none"> • Question properly rephrases the Goal • Answer provides a 1 sentence summary solution to the question 	<ul style="list-style-type: none"> • Question properly rephrases the goal • Answer does not address the question properly 	<ul style="list-style-type: none"> • Question unrelated to the Goal • Answer not provided
Market Overview	<ul style="list-style-type: none"> • Market is well defined and segmented • Market size, growth, and trends summarized • Simple, clear graphics and/or charts 	<ul style="list-style-type: none"> • Market is defined and segmented • Market size, growth, and trends not properly captured or summarized • Simple graphics and/or charts 	<ul style="list-style-type: none"> • Market is not well defined or segmented • Market size, growth and/or trends not shown or summarized • Graphics and/or charts do not clearly show segmentation
Analysis	<ul style="list-style-type: none"> • Customers are characterized (segmentation, size, growth) and purchase behavior detailed by unmet needs and “pinch points” • Competition is characterized (segmentation, size growth), positioned and analyzed (e.g. SWOT) • Analytical model (e.g. Porter’s or Value Chain) used to assess broader issues • SWOT included to summarize conclusions from analysis 	<ul style="list-style-type: none"> • Customers are partially characterized and purchase behavior partially detailed • Competition is partially characterized, positioned and/or analyzed • Analytical model not used • SWOT included to summarize conclusions from analysis 	<ul style="list-style-type: none"> • Customers are not properly characterized and purchase behavior not detailed • Competition is not properly characterized, positioned or analyzed • Analytical model not used • SWOT provides superfluous conclusions
Alternatives	<ul style="list-style-type: none"> • 2-4 mutually exclusive clearly stated Alternatives that each answer the Strategic Question • Alternatives are derived from Opportunities in SWOT 	(Only one of the following provided) <ul style="list-style-type: none"> • 2-4 mutually exclusive clearly stated Alternatives that each answer the Strategic Question • Alternatives are derived from Opportunities in SWOT 	<ul style="list-style-type: none"> • 2-4 mutually exclusive Alternatives that each answer the Strategic Question not clearly stated • Alternatives are not derived from Opportunities in SWOT
Criteria	<ul style="list-style-type: none"> • 8-10 Criterion listed that reflect key points used to decide which Alternative is best • Criteria must include the Objectives 	<ul style="list-style-type: none"> • 8-10 Criterion listed (but not necessarily those that reflect key points) • Criteria used to decide which Alternative is best • Criteria must include the Objectives 	<ul style="list-style-type: none"> • 8-10 Criterion not listed • Criteria do not reflect key points used to select best Alternative • Criteria do not include the Objectives
Analysis of Alternatives	<ul style="list-style-type: none"> • All Alternatives are assessed equally against all criteria • Rating system and presentation of data clearly shows best alternative 	<ul style="list-style-type: none"> • All Alternatives are assessed equally against all criteria • Rating system and presentation of data does not clearly show best alternative 	<ul style="list-style-type: none"> • All Alternatives not assessed equally against all criteria • Rating system and presentation of data does not clearly shows best alternative
Recommendations	<ul style="list-style-type: none"> • Recommendations start with best 	<ul style="list-style-type: none"> • Recommendations start with best 	<ul style="list-style-type: none"> • Recommendations only

	<p>Alternative</p> <ul style="list-style-type: none"> • Additional recommendations made that would apply, regardless of Alternative • Additional recommendations made that “fill in” the strategy (e.g. major initiatives required by function team, partners, etc.) 	<p>Alternative</p> <ul style="list-style-type: none"> • Additional recommendations made either, that would apply, regardless of Alternative, or that “fill in” the strategy (e.g. major initiatives required by function team, partners, etc.) 	highlight preferred Alternative
Risks and Mitigations	<ul style="list-style-type: none"> • 3-5 top controllable risks itemized with mitigation recommendations • 3-5 top uncontrollable risks itemized with alternatives listed 	<ul style="list-style-type: none"> • Adequate number of risks provided • Risks may or may not be segmented between controllable and uncontrollable • Mitigations or alternatives may or may not be provided 	<ul style="list-style-type: none"> • Inadequate number of risks provided • Risks not segmented between controllable and uncontrollable • No mitigations or alternatives provided
Appendices	<ul style="list-style-type: none"> • Goal(s) and Objectives must appear properly identified and formatted • Additional data re: market, customers, competition, product, etc. provided as necessary 	<ul style="list-style-type: none"> • Goal(s) and Objectives must appear properly identified and formatted • Additional data re: market, customers, competition, product, etc. either not provided as necessary or provided as superfluous 	<ul style="list-style-type: none"> • Goal(s) and Objectives do not appear properly identified and formatted • Additional data re: market, customers, competition, product, etc. is not provided as necessary