Multicultural Consulting CES-BUS 241
Leslie Lum
Course Syllabus – Winter 2012

Course Requirements

	Total Points	Your Points
Cover letter (5), resume (5) and 10 questions (5) (Individual)	15	
Team Contract (Team)	25	
Project Management Plan (Team)	50	
Business Case Statement (Individual)	50	
Individual and Team Recommendations	35	
Research Instrument (Team)	25	
Draft Report (Individual) Must be submitted to turnitin.com **Class ID 4675044** **Password: CES241**	75	
Presentation (Team)	75	
Book Review – 5 modules	60	
Final Report – (Team) Individual grades may be adjusted based on peer evaluations	150	
TOTAL	560	

REQUIRED BOOK: Closing the Gap: Diverse Markets and Diverse Entrepreneurship – Printed module available at bookstore is mandatory for all students.

Assignment Policies

10% of the total possible points for each assignment will be deducted for each day the assignment is late. **Grading on team assignments may be adjusted based on monthly peer evaluations.**

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Grading

95 - 100%	A	4
90 - 94	A-	3.7
86 - 89	B+	3.3
83 - 85	B	3.0
80 - 82	B-	2.7
76 - 79	C+	2.3
73 - 75	C	2.0
70 - 72	C-	1.7
66 - 69	D+	1.3
60 - 65	D	1.0
Below 60	F	0

A pass grade will not be given unless all requirements of the course are completed.

Consulting Timeline – Assignments are Due on the THURSDAY of the week noted.

Deadlines may be adjusted.

Non class days 1/31/12, 3/1/12

Key Dates: Kickoff meeting January 12 THURSDAY D106

Final Presentation: March 15 THURSDAY N201

Week	**Jan 3, 5**	**10, 12**	**17, 19**	**24, 26**	**Feb 2**	**7, 9**	**14, 16**	**Feb 21, 23**	**28**	**Mar 6, 8**	**Mar 13, 15**	
	Prepare for Kick-off Meeting Assign teams Team forming											
		Review and execute consulting contract Interview and research business Draft, revise and execute team contact										
			Draft and revise project management plan Start secondary research									
				Draft and revise business case statement Analyze and organize secondary research								
					Plan, draft and test primary research							
						Conduct primary research						
							Analyze and organize primary research Draft and revise preliminary recommendations					
								Draft final report				
									Draft, revise, rehearse presentation			
										Revise final report		
TUES	Introduction Teaming	Consulting process Research		Team check on research	Fishbowl SWOT	Test primary research instrument	Open	Fishbowl preliminary recommendation	Writing			
THURS	30-second commercials Business assignments	Kickoff Meeting	Jan 19 Dave Halverson	Tentative Tam Limpaphayom	Tentative Jose Vasquez	Presentation of survey instruments	Open	Team consensus	Tentative Stephanie Hurst - Speech	Presentation rehearsal and final presentation		Debrief
Due	**Jan 5 Business choice 30-sec commercial Resume**	**Jan 10 Business questions** **Jan 12 Kickoff meeting D106**	**Jan 19 Team Contract** **Book Review Module 3**	**Jan 26 Project Management Plan** **Book Review Module 4** **Peer evaluation due**	**Feb 2 Business Case Statement including SWOT analysis** **Book Review Module 5**	**Feb 9 Primary Research Instrument**	**Feb 16 Book Review Modul e 1 and 2**	**Feb 23 Preliminary Recommendatio ns (Individual recommendatio ns must be submitted before team meets for consensus.**	**Mar 1 Book Review Module 6** **Peer evaluatio n due.**	**Mar 8 Individual Draft Report**	**Mar 13 Presentation rehearsal** **Mar 15 Final Presentation N201**	**Mar 20 Final Report**

Time and place	Time: T TH 12:30 pm Room: R203
Contact	Telephone: 425-564-4063 Email: llum@bellevuecollege.edu Office mail: D110
Office hours	Office Location C207 **Office Hours: MTWH 9:30 to 10:20 pm or by appointment**
Website	**Use CES 241 mybcc.net website for all class materials**
Public Safety	The Bellevue College (BC) Public Safety provides personal safety, security, crime prevention, preliminary investigations, and other services to the campus community, 24 hours per day, 7 days per week. Their phone number is 425.564.2400. Public Safety is located in K100 and on the web at: http://bellevuecollege.edu/publicsafety/ for campus emergency preparedness information, campus closure announcements and critical information in the event of an emergency.
Outcomes	All outcomes are expected to be performed in a professional manner suitable in a consulting firm: 1. Analyze a business problem or opportunity. 2. Conduct secondary and primary research. 3. Work effectively as part of a team and reflect on the team process. 4. Plan and effectively manage a project. 5. Use key business concepts and analysis in synthesizing and analyzing the problem or opportunity. 6. Communicate effectively with the business owner, mentors and advisors to effect change and transformation of the business. 7. Communicate findings in an oral presentation according to professional standards. 8. Write a series of papers including an extensive final report which includes critical thinking, problem solving, and actionable recommendations.
Resources	This course requires that you demonstrate and develop your writing and research skills. We recommend that you consult the Reading/Writing lab (A262 http://www.bellevuecollege.edu/writinglab/ with the drafts of your assignments and that you make use of the Library Media Center (L Building http://www.bellevuecollege.edu/lmc/) in doing research. If you intend to and have not already done so, declare your business major. Make sure you have consulted with an advisor and laid out your courses. The Business Division recommends that you subscribe to the Business listserv which provides notices of application deadlines and events. To subscribe to the listserv, individuals should send a message to: lyris@list.bellevuecollege.edu. In the body of your message write SUBSCRIBE bccbusiness.
How to succeed in this course	• Attend ALL classes and be prepared for the class. • Devote sufficient time to the project.

- Read the book.
- Work well as a team and seek help when needed.
- Plan your project well.
- Work closely with your client.
- Do your work early.
- Make good use of your mentors, advisors, and instructor.

Disability Resources

The Disability Resource Center serves students with a wide array of learning challenges and disabilities. If you are a student who has a disability or learning challenge for which you have documentation or have seen someone for treatment and if you feel you may need accommodations in order to be successful in college, please contact DRC as soon as possible.

If you are a person who requires assistance in case of an emergency situation, such as a fire, earthquake, etc, please meet with your individual instructors to develop a safety plan within the first week of the quarter.

The DRC office is located in B 132 or you can call at 425.564.2498. Deaf students can reach us by video phone at 425-440-2025 or by TTY at 425-564-4110. Application information and other helpful links at www.bellevuecollege.edu/drc

Student Code

"Cheating, stealing and plagiarizing (using the ideas or words of another as one's own without crediting the source) and inappropriate/disruptive classroom behavior are violations of the Student Code of Conduct at Bellevue College. Examples of unacceptable behavior include, but are not limited to: talking out of turn, arriving late or leaving early without a valid reason, allowing cell phones/pagers to ring, and inappropriate behavior toward the instructor or classmates. The instructor can refer any violation of the Student Code of Conduct to the Vice President of Student Services for possible probation or suspension from Bellevue College. Specific student rights, responsibilities and appeal procedures are listed in the Student Code of Conduct, available in the office of the Vice President of Student Services." The Student Code, Policy 2050, in its entirety is located at: http://bellevuecollege.edu/policies/2/2050_Student_Code.asp

Standard of Behavior

All interactions will be evaluated as to whether they are acceptable in the business environment. This includes interactions in the class, on online discussion forums, email communications, with the instructor, with fellow students, and in the community. Inappropriate communications include jokes and discussions your classmates find offensive, excessive messages, and other communications which would be typically deemed inappropriate in the workplace. The student will be informed and expected to comply with requests for change and improvement.

Social Science policies can be viewed at https://bellevuecollege.edu/socsci/policies.asp.

Affirmation of Inclusion

Bellevue Community College is committed to maintaining an environment in which every member of the campus community feels welcome to participate in the life of the college, free from harassment and discrimination. We value our different backgrounds at BCC, and students, faculty, staff members, and administrators are to treat one another with dignity and respect.

Code of Honor

By being a student in this course you acknowledge that you are a part of a learning community at Bellevue College that is committed to the highest academic standards. As a part of this community, you pledge to uphold the fundamental standards of honesty, respect, and integrity, and accept the responsibility to encourage others to adhere to these standards.

What to expect in this class

Multicultural consulting students make a huge difference:
BC students in this class have provided over 10,000 consulting hours with a market value of over $500,000 to businesses and organizations such as Redapt, Asia Pacific Language School, Academic Edge (woman-owned), and the Washington Hispanic Chamber of Commerce. This course won a national award in service learning and was commended by the Washington State Legislature as a contributor to small business development. It was included in the Economic Prosperity Partnership as a model program for small businesses.

The course provides what employers want:

- Only 13 percent said transcripts were very useful with another 16 percent saying fairly useful, compared to 33 percent who said “not useful.”
- What the employers appear to want are intensive, personally evaluated projects, not more testing. Only 7 percent said it would be “very effective” to have the results of multiple choice tests of general knowledge, and there was little interest in tools that would compare on colleges’ graduates to another on critical thinking tests.
- In contrast, 46 percent said it would be very effective and 70 percent said it would be very or fairly effective to have students complete an advanced project as seniors, demonstrating knowledge in the major and in problem-solving, writing, and analytic skills. And 69 percent said it would be very effective and 83 percent said it would be very or fairly effective to see an evaluation of a supervised internship where students apply college learning in a “real-world setting.”

What is expected of you:
All classes require active participation of students and considerable interaction with businesses, other advisors, Rotary mentors and your team mates. You are expected to actively seek out advisors and resources to complete your work. **You are also expected to behave according to the highest professional standards with everyone you interact with**. Team conflicts should be dealt with in a professional manner and kept within the student team and instructor.

Some sessions in class are fishbowl sessions (which are common in entrepreneurial environments). You may be called upon to present your interim work and defend it against questions from your cohorts. This class will have a vigorous atmosphere of critique and support. *Critique hard, but support harder.*

All teams will be expected to give a biweekly status report to the instructor on work completed to date. Action items determined by the instructor must be completed according to mutually determined deadlines.

If nothing appears on the schedule for the date, you are free to schedule meetings outside of class, but you must have these preapproved by the instructor and you must provide minutes of the meeting.

Most students claim this is the *best* class experience they have at the college and that it requires the *most work*. We are all (your mentors, advisors, businesses, team mates and instructor) in this to deliver the best project possible so that we can enhance the economic development of underserved businesses in the state of Washington. Let's make a difference together!

Guest Speakers:
Dave Halverson is Senior eBusiness Analyst
Enterprise Supply Chain Integration
Boeing Engineering, Operations & Technology. He is the Boeing focus for Mindjet, a project management tool. Dave has been an active supporter of multicultural consulting for the past 8 years. Dave will present on project planning, mind mapping and teaming.

Professor Tam Limpaphayom is former director of the EWU Business Program at Bellevue College. She has extensive experience with human resources and other business consulting. Tam will present on SWOT analysis.

Jose Vasquez is CEO of Del Mar a firm which provides consulting to small businesses on web marketing. Jose will present on web marketing including use of social networking.

Applying for Your Business and Preparation for Kickoff Meeting

Submit your resume and a cover letter giving reasons why you selected the two businesses and what value you bring to the business at the second class session.

In preparation for the kickoff meeting, complete a 30-second commercial for yourself, also called the elevator speech. You have 30 seconds to tell a complete stranger about yourself. This will be presented at the second class.
:

- Give your name.
- Characterize your experience.
- In one or two sentences, describe the unique focus of your experience. How are you different from other people?
- Give your goal.

Read the book and prepare a list of 10 questions for your business for the third class session.

Book Review – Individual Assignments
60 points

Each student is required to submit a review of reading modules of the book. At the due dates listed on the syllabus, submit a 500 word paper outlining the following:

What helped you learn the most in the module? Give specific examples with page number and explain how it helped you learn.

What was unclear in the module? Give specific examples with page number and explain what was unclear.

Team Contracts
Team Assignment
25 points

The goal of this team assignment is to facilitate quality communication between team members such that they can move from the forming to the norming phase. Teams who go through this assignment in a perfunctory manner may shortchange the transition. It is important that all team members participate in the discussion and agree to the ground rules outlined. More collaboration fosters the trust that leads to effective norming.

List all the behaviors that will make the team more productive and those that will not.
All team members should sign the contract signifying that they have contributed to the discussion and that they agree to abide by the contract.

To track team progress, monthly individual reflections with the diagnostic assessment provided in the teaming chapter should be used.

Team Contract Grading Rubric

Meeting logistics defined including meeting times and places	3
Method of communication defined including contact information	2
Team roles defined	2
Decision making defined	2
Make a list of the behaviors the team should engage in and one it should NOT engage in	2
Peer evaluation instrument included	2
Conflict resolution defined	2

Individual peer evaluation at the end of January and February will be given 5 points each. Peer evaluation to include diagnostic assessment and written reflections on what you are learning as a team member.

Project Management Plan
Team Assignment
50 points

The Project Management Plan is a team assignment. The goal of this assignment is to enable the project team to plan its work for the quarter. By establishing a solid project management plan, the team will have identified the problem it is solving, the strategies and tactics it will use to address the problem, and the resources it needs to complete its work. Additionally, the team will have developed a mechanism for controlling the project and ensuring progress is being made to reach its goal.

The plan must include the following components:

Project Management Grading Rubric

a. The **project mission or purpose is a summary statement** that defines the scope, objectives, and overall approach for the work to be completed. It is a critical element for initiating, planning, executing, controlling, and assessing the project. It should describe how the project will assist the business in capitalizing on an opportunity or solving a problem.	3
b. The **project goals and objectives** outline what specific goals the project will accomplish. This should be an elaboration of the work areas outlined in the consulting contract. In certain instances, it may be advisable to specify what is **not** included in the scope of the project to clearly set expectations with the client.	3
c. **Project deliverables** that will be produced for the client. This is a list of the items that will accompany finished project. In addition with a detailed description of the deliverable, the project plan should include the specifications as to the quality and quantity of the deliverable. For example if a web site is being created, the end specifications would be the documentation that will be left with the business owner describing how the web site was put together and how changes can be made.	12
e. **Work Breakdown Structure**: This identifies all of the tasks that must be performed in order to achieve the objectives of the project. Tasks should be broken down into larger tasks, subtasks and milestones. Tasks should be grouped and any tasks that rely on each other must be identified. MS Project or Excel may be used to complete this task.	7
f. **Schedules:** Give start and complete dates on each task along with estimated hours. Students should compile a Gantt chart or calendar showing all tasks. This can be done automatically on MS Project.	5
g. **Budget:** Team members will be assigned to each task and a projected budget of hours and cost will be compiled. Use an hourly billing rate of $15 for student and $100 for mentors. MS Project or Excel may be used to complete this requirement.	5
h. **Control systems.** Each team will be required to submit status reports showing actual against planned along with their monthly team reflections. Reports should show hours by task by team member. Create a reporting tool that lists all the tasks and allows team members to fill in their hours on a weekly basis. MS Project or Excel may be used to complete this requirement. The final project accounting with hours by task by team member should be included in the appendices of the final report.	5
I **Summary of Tasks by Team Member**: This section reorganizes section e by team member. Provide a list of what each team member contributed to this project management plan.	5
j. **Risk areas with contingencies:** Risk management identifies risks in the project which may stop the project from being performed on time and within budget. It estimates and evaluates the impact of the risk; and suggests a control process or contingency plan to address the risk.	5
	50

Business Case Statement
Individual Assignment
50 Points

The business case statement is a description and validation of the project based on the data gathered to this point. The main parts of the statement include the purpose of the project, a definition of the business (organization or client), a SWOT analysis or the identification of problems and/or opportunities facing your client, and an explanation of how this project will benefit the client. A brief indication of the new skills and knowledge that each student consultant is gaining is required.

This is an individual assignment. Even if your team mates produced some of the secondary research, the analysis should be your own. The length is in the four to five page range (single spaced). Parts of this business case statement (business history and definition and SWOT) can be used later for the final report.

Prior to submitting this to faculty for grading, the business case statement must be forwarded to advisors and/or mentors for their review and feedback. Do not submit a first draft. Mentors have little patience for incoherent description, poor organization, grammatical errors and typos. You need not have received a response just provide evidence (copy of email copy and pasted) that you sent your business case statement to your mentor.

Rubric for Business Statement

NO GRADE WILL BE GIVEN UNLESS THE MENTOR HAS RECEIVED YOUR STATEMENT AND YOU HAVE INCORPORATED ANY COMMENTS, IF RECEIVED IN TIME. PLEASE ATTACH EMAIL TO/FROM MENTOR. IF THE MENTOR DOES NOT REPLY IN TIME, ATTACH THE EMAIL SENDING THE REQUEST TO YOUR MENTOR.

Purpose (5 points)
Include here an indication of the project mission and the deliverables to be provided. Individual articulation of purpose ensures that all team members have a clear direction in which to move forward.

Business Definition (5 points) (What kind of business is your client in?)
Define and describe the business in detail including its history, assets, employees, etc. Indicate the main goods and services produced or provided by the firm or organization (customer value proposition), Describe the market(s) or customer groups that are served and any unique characteristics that may be identified. Articulate the business model.

SWOT Analysis (15 points)
Using the Five Forces and SWOT combination format create a SWOT analysis of the business.

Internal Environment	Strengths	Weaknesses
Management		
Marketing		
Operations		
Finance/ Accounting		
Human Resources		

General External Environment	Opportunities	Threats
Economy		
Political/Legal		

Demographics		
Socio-Cultural		
Technology		
Natural		
Global		

Specific External Environment	Opportunities	Threats
Competitors		
Buyers		
Suppliers		
New Entrants		
Substitutes		

<u>Secondary Research Summary (10 points)</u>
At this point, you should have completed a substantial portion of your secondary research for the project. You should have an idea of the market size, characteristics of the target market, number of competitors, competitive traits, etc. Even if parts of the research was done by a teammate, it should have been shared with the entire team.

Individually summarize the research and provide conclusions to the direction of the research. Provide the sources for all your research with APA citation. Where does your secondary research point to?

<u>Value-Added Benefits to the Client (5 points)</u>
How will the deliverables help the client? What measurable results do you think you will be able to deliver to the client? How will the value-added be measured?

<u>Value-Added Benefits to You (5 points)</u>
What skills and knowledge do you plan to gain from working on this project? What experiences will you seek out to advance your career?

<u>Writing (5 points)</u> Evidence sequence, organization, diction/style and mechanics.

Research Instrument
Team Assignment
15 Points

Primary Research Instrument

Many teams will be required to create a research instrument as part of fulfilling the consulting engagement objectives. This list provides a checklist of steps to guide the process:

1. Conduct secondary research first. Typical research instruments may be available or trade associations may have done research already.
2. Conduct preliminary research. If the survey involves customers, find a few customers to ask exploratory questions. If the primary research involves businesses, ask the client to recommend some representative businesses to speak to. The goal is to understand as completely as possible the issues that are to be studied, therefore, it is more helpful to ask open-ended questions.
3. Create a research instrument and review it with mentors and faculty. Specify the objective each question is addressing. Revise the instrument based on feedback.
4. Pretest the instrument on a few typical respondents. Revise the instrument based on observations and feedback.
5. Submit the instrument to faculty for final approval. Include a description of how many respondents and how the respondents will be selected.
6. Administer the instrument.

Report on Preliminary Recommendations
Individual Assignment
Points: 25 (Individual) 10 (Group Consensus)

This assignment is intended to encourage individual and independent thinking on the problems, analysis and basic objectives of your portion(s) of the project. We recognize that at this point you have not fully analyzed all of the data that you have and may not have covered some aspects of all the deliverables that will be developed for your client. But working with what you have on an individual basis will ultimately increase and strengthen the group-based recommendations that will form the basis of the recommendations section of your written group project report.

At this point in time, the tendency is to favor recommendations because you spent the most time on them. These are not always the best recommendations. Recommendations cannot be general like come up with a marketing plan or use facebook and twitter. You have to prove to the business that any recommendations will be of benefit. All recommendations have costs. It is your job as a consultant to come up with

Recommendations to the client will focus on the decisions, policies and actions that will address the issues and solve the problems that you have worked on. They should be clearly presented. In addition, they should be within the resource capabilities of the client and, by the time that they have been agreed upon by the group, have a "buy-in" from the client that indicates enough support for their acceptance and implementation. Effective recommendations must be measurable. When coming up with recommendations, create a metric for the business to determine whether or not it has achieved its goal. Read Module 7 to learn about effective recommendations.

The best preliminary recommendations are approximately three pages in length, expound on recommendations that can be backed by evidence gathered to date, and provide an action plan that moves the business forward yet is within the resource limitations of the business.
Requirements include:

- Detailed description and explanation of the recommendations including what decisions the business owner should make in response to the actions or changes proposed. (5)
- Persuasive content that provides evidence for the recommendations including the quantified costs and benefits of each recommendation. (10)
- Recommendations grouped and ordered by importance and priority. (5)
- Writing in the correct voice, style and without grammatical or spelling errors. (5)

Once individual preliminary recommendations are submitted, your team will meet in class and come up with a consensus set of recommendations. It is important that the team sense out any such disagreements at this point so that it can move forward effectively with a consensus report. Read Module 3 on teaming and Module 7 on evaluating alternatives for strategies on resolving differences. Meeting notes from the consensus process will be required.

Group Consensus

Take the best of all the individual recommendations and compile a group consensus. (6)
Include minutes of the meeting as to how the team determined what should be the group consensus. (4)

Final Presentation
Team Assignment
75 Points

Objective: The final presentation showcases the work of the team. It provides the business owner with an overview of the findings which will be discussed in detail in the final report and in follow-up discussions. It is important that the team has done its groundwork and briefed faculty and mentors on the recommendations prior to the final presentation. Unless this is done, the team may go through the embarrassment of presenting flawed analysis or solutions that are not completely thought through. This can be extremely detrimental to the business and, in the past, has caused businesses to reject outright all the work done by the student team.

Audience: The audience for the presentation will be the business, advisors, mentors, other industry professionals, government officials, and the faculty. Think very carefully about the needs of each of these groups. Organize your material so that it is relevant to the audience. A brief history of the business may be necessary orient members of the audience. There should be no more than three to five main points. Decide as a team what those main points should be. It is important for any visual display of information is appropriate. Large amounts of text or numbers is not appropriate for projection. The audience doesn't have the time to grasp details. Save those for the report. Although dark backgrounds and white fonts seem dramatic, they fade out in a room with any light. Don't use any pictures or graphics that do not make a point. They will only distract. As a general rule, very little use of animation (other than transition) is made in professional presentations. Be prepared for technical glitches with backup copies. Be aware that the most technically complex presentations are the most difficult to recover from if there are technical problems.

Preparation: The presentation deck of slides should be prepared well in advance of the presentation day and reviewed with mentors and faculty. It is important that the presentation be rehearsed many times. Reading off cards detracts from credibility. Some faculty require that student teams rehearse in class and incorporate any suggested improvements into the presentation. Watch body language such as fidgeting or stiffness. Know the material thoroughly and believe in what is said. Communication is most effective when passionate about the topic. Jokes are tricky as they can offend. It is best to leave them out.

Limit the amount of overhead in the presentation. This includes introductions and transitions between presenters. Do not include any slides that don't give information. Give out slides or handouts because it will help people remember but it is best to give out material after the presentation.

Never, never go over the time limit. The presentation might be part of a series of presentations and going over the limit will impact the presentations for the rest of the day. Additionally, going over time limits gives the impression that the team does not have control over the material.

There can be no errors, typos, or grammatical mistakes in the final presentation. The only way to prevent this is to review the presentation deck several times.

Presentation Grading Criteria (Completed by instructors and mentors)

- Organization (Main points were evident and organized so that the audience could follow, recommendations were supported) 25
- Visual Display (Clear, appropriate, efficient) 18
- Delivery (Well-rehearsed, knew material, projected credibility, connected with audience, able to field questions) 20
- Logistics (Finished on time, had back-up forms of presenting, hand-outs organized and available) 12

Draft and Final Written Client Report Team Assignment 75 (individual) and 150 (final group) points

In order to expedite the report writing process, it is recommended that the team become familiar with the capabilities of MS Word to facilitate the revision process, create outlines and generate reports. If the draft report is set up correctly, MS Word can generate a table of contents.

1. Each and every team members must complete **individual draft section reports** for the task or area of study where they contributed the most. As a rule of thumb, these section reports (excluding appendices and exhibits) are a minimum of 10 pages. Having all team members participate in the writing process ensures that writing skills are developed. **No sections of the business case statement should be included in the individual draft section report. They focus mainly on synthesizing the secondary and primary research, coming up with key findings from the research, and the recommendations that follow from them. No recommendations should be made without secondary or primary research that pertains directly to the recommendation. General recommendations about marketing, planning, and social network tools is not helpful unless you have proven from specific research that they apply to your client. Primary research should take precedent.**
2. Team members will review the draft for completeness and writing. As part of the process, the team may devise a writing style sheet to ensure that all writing is consistent and create a Word template for the final report. They will compile a **team draft report** including executive summary and recommendations. Be aware that often teams are synthesizing at the same time as they are writing. It is important to start the writing process well in advance of the due date so that drafts can be reviewed and issues can percolate. Often having a few days to mull over a large amount of data can yield much better solutions. Some faculty may request that individual section reports must be submitted with the team draft report and would factor into the grade for each team member.
3. The instructor and mentors will review the draft report and give feedback. Feedback is most efficiently given by using the Reviewing functionality on MS Word.
4. The team will incorporate all feedback and create a final report of professional quality. The report will be graded on the quality of the critical thinking, analysis, and recommendations that are made. This means that the data is not simply dumped but it has been carefully analyzed for significant patterns. Recommendations are backed by evidence and research. The final report will incorporate all changes recommended by your mentors and instructor. The instructor will give the copy to the business when it is thoroughly reviewed and approved. **No copies may be distributed to the business owner by the team prior to final review by faculty.** Two hard copies and one digital copy are required. These are professional reports directed to the business client and must provide all the information necessary to implement the recommendations. Student teams often provide extensive lists and data files in the appendices. This report serves as an important knowledge management and accountability tool for the program. It provides a record of what was done and how success should be measured.

Individual Draft Grading Rubric
Individual assignments must be submitted to turnitin.com
Class ID 4675044
Password: CES241

<u>Do not paraphrase general materials, checklists, graphics, or summaries available for marketing, legal, web marketing, or other publications or sources on the web. The report must address specific research (secondary or primary) that you did for the company and your specific findings that relate to the mission of the project.</u>

Analysis and Findings _____ out of 30
Data analysis and presentation of findings on market analysis, competitive analysis, business process analysis (if applicable), and primary research.
Was the visual display of information effective?
Was the research sufficient or was key information not sought?

Was the methodology sound?
Was analysis (business process, marketing, financial, etc.) done correctly?
Were the conclusions drawn supported by the evidence?
Were patterns or conclusions missed?
Were incorrect conclusions drawn?
Were the findings categorized and prioritized?

Recommendations _____ out of 30
This section presents the proposed actions, the feasibility of the actions, and the expected benefits and costs of these actions.
Were the recommendations supported by the evidence?
Do the recommendations fit with the mission and vision of the business?
Does the business have access to the resources necessary to implement the recommendations?
What benefits will the recommendations provide to the business?
Were the benefits quantified correctly?
Were the recommendations time bound?
Have the risks been analyzed?
Do the recommendations clearly articulate how the business will measure whether it had been successful in implementing the recommendations?
Were the recommendations grouped by category and prioritized?

Writing Style ____ out of 15
This includes an evaluation of the appearance, spelling, grammar of the report as well as the logic and flow of the presentation. There should be no grammatical or other errors in the final report.
Was the writing of the required length?
Was the voice that of a business report?
Was the writing formatted for better communication? (Use of sub-headings, bullets, etc.)
Were there any grammatical or other errors?

Elements of the Final Report

Cover Letter
The cover letter, addressed to the business client, announces the topic and how the report was authorized, describes the project, highlights the findings, conclusions and recommendations, and closes with thanks to the client.

Executive Summary
This focuses on what managers/decision-makers need to know. Executive summaries are difficult to write and the team should take the time to think through all the findings and recommendations before tackling it. Typically executive summaries are drafted after the body of the report is complete. They must provide the highlights of the work and call for action. Good executive summaries undergo many revisions.

Table of Contents and Formatting
If headings are properly formatted, a table of contents will be automatically generated. This is helpful as often the team will move individual sections of the report in the drafting process. Make sure that fonts, headings and formatting are consistent throughout the report. Use the header/footer function to include page numbers.

Background/Introduction
This section includes an explanation of purpose and scope of the project and presents the methods of research and analysis. It provides background information on the company, financial performance and management biographies.

Body of the report

This main section of the report will include data analysis and presentation of findings on strategic and competitive analysis, business process analysis, and other discussion. Use effective visual display of information. Student teams are reluctant to put graphs and diagrams in the body of the report even though they greatly enhance the readability of the report. As these reports are quite long (50 to 100 pages), it is important to categorize and prioritize the findings. The quality of the research and analysis will determine the points allotted. Was the research sufficient or was key information not sought? Was the methodology sound? Was analysis (business process, marketing, financial, etc.) done correctly? Were the conclusions drawn supported by the evidence? Were patterns or conclusions missed? Were incorrect conclusions drawn?

Recommendations

This section presents the proposed actions, the feasibility of the actions, and the expected benefits and costs of these actions. Recommendations should be grouped by category and prioritized. Were the recommendations supported by the evidence? What benefits will the recommendations provide to the business? Do the recommendations fit with the mission and vision of the business? Does the business have access to the resources necessary to implement the recommendations? Were the recommendations time bound? Have the risks been analyzed? How will the business measure whether it had been successful in implementing the recommendations?

References and Sources of Information

These should be included appropriately within the report. This means that in some instances using footnotes are most appropriate and in others citing the source within the body of the report is most appropriate. These reference and sources should at least be used to demonstrate research completed and to substantiate recommendations. Use APA convention for bibliographies.

Illustrations, Exhibits, Appendices

Include copies of survey, summaries of results, transcripts of focus groups or significant interviews. Student teams often include data sets that provide valuable prospecting lists to the businesses.

A copy of the time log by task must be completed by all team members and included in the final report.

Writing Style

This includes an evaluation of the appearance, spelling, grammar of the report as well as the logic and flow of the presentation. There should be no grammatical or other errors in the final report. The report should be formatted such that there are headings and subheadings that guide the reader.

Final Report Grading Rubric

Cover Letter ____ out of 5

The cover letter, addressed to the business client, announces the topic and how the report was authorized, describes the project, highlights the findings, conclusions and recommendations, and closes with thanks to the client.

Executive Summary ___ out of 20

This focuses on what managers/decision-makers need to know. Recommendations in order of priority. Concise. Clear.

Table of Contents and Formatting ___ out of 5

Headings properly formatted. Hierarchy of writing evident. Fonts and formatting is professional.

Background/Introduction ___ of 5

Explanation of purpose and scope of the project and presents the methods of research and analysis. It provides background information on the company, financial performance and management biographies.

Body of the report _____ out of 40

Data analysis and presentation of findings on market analysis, competitive analysis, business process analysis (if applicable), and primary research.

Was the visual display of information effective?
Was the research sufficient or was key information not sought?
Was the methodology sound?
Was analysis (business process, marketing, financial, etc.) done correctly?
Were the conclusions drawn supported by the evidence?
Were patterns or conclusions missed?
Were incorrect conclusions drawn?
Were the findings categorized and prioritized?

Recommendations ___ out of 40

This section presents the proposed actions, the feasibility of the actions, and the expected benefits and costs of these actions.

Were the recommendations supported by the evidence?
Do the recommendations fit with the mission and vision of the business?
Does the business have access to the resources necessary to implement the recommendations?
What benefits will the recommendations provide to the business?
Were the benefits quantified correctly?
Were the recommendations time bound?
Have the risks been analyzed?
Do the recommendations clearly articulate how the business will measure whether it had been successful in implementing the recommendations?
Were the recommendations grouped by category and prioritized?

References and Sources of Information ___ out of 5

These reference and sources should at least be used to demonstrate research completed and to substantiate recommendations. Use APA convention for bibliographies.

Illustrations, Exhibits, Appendices ____ out of 10

Include copies of survey, summaries of results, transcripts of focus groups or significant interviews. Student teams often include data sets that provide valuable prospecting lists to the businesses.

Mandatory copy of the time log by task must be completed by all team members and included in the final report.
____ out of 5 (Report is considered incomplete without this.)

Writing Style _____ out of 15
This includes an evaluation of the appearance, spelling, grammar of the report as well as the logic and flow of the presentation. There should be no grammatical or other errors in the final report.
Was the writing of the required length?
Was the voice that of a business report?
Was the writing formatted for better communication? (Use of sub-headings, bullets, etc.)
Were there any grammatical or other errors?