

# WRITTEN CASE FORMAT (see pages iv – xii)

Page 1. Cover sheet with the case title and the consultants' names.

Page 2. Table of Contents (include the appropriate page numbers).

Beginning on Page 3:

## **Section 1:**

- A. Statement of the Mission.
- B. Statement of the Objectives.
- C. Corporate Business Structure.

**Section 2:** Financial analysis depicting the corporation's (company's) financial position. (Minimum of balance sheet, income statement, summary and at least two ratios from each financial category)

## **Section 3.** The environmental threat/opportunity profile

- a. Environmental Analysis
- b. SWOT Analysis
- c. Five Forces Analysis

## **Section 4:** The Strategic Advantage Profile

- a. Value Chain Analysis
- b. Tangible Resources
- c. Intangible Resources
- d. Capabilities
- e. Core Competences
- f. Business-level strategy (identify and describe)
- g. BCG Growth Matrix
- h. Competitive Analysis
- i. Competitive Dynamics
- j. First mover, Second mover, Late Mover
- k. Slow cycle market, Fast cycle market, Standard cycle market
- l. Corporate level strategy
- m. Level of diversification
- n. Mergers, Acquisitions and Takeovers
- o. International Strategy (Outsourcing, Alliances, Cooperative Strategy)
- p. Corporate Governance - Agency problems
- q. ANY other ANALYTICAL TOOLS in your textbook

## **Section 5 – Financial Analysis**

- a. Profitability ratios**
  - 1. Return on Total Assets
  - 2. Return on Stockholder's equity
  - 3. Return on Common Equity
  - 4. Operating Profit Margin
  - 5. Net Profit Margin

- b. Liquidity ratios**
  1. Current Ratio
  2. Quick Ratio
  3. Inventory to Net Working Capital
  
- c. Leverage Ratios**
  1. Debt-to-Assets
  2. Debt-to-Equity
  3. Long-term debt-to-Equity
  4. Times-interest-earned
  5. Fixed charge coverage
  
- d. Activity Ratios**
  1. Inventory Turnover
  2. Fixed-assets turnover
  3. Total assets turnover
  4. Accounts Receivable Turnover
  5. Average Collecting Period
  
- e. Shareholder's Return Ratios**
  1. Dividend yield on common stock
  2. Price-earnings ratio
  3. Dividend payout ratio
  4. Cash flow per share

**You MUST Calculate the ratios above**

**You MUST analyze and interpret the ratios calculated above (tell me what the calculated ratios mean for the firm)**

**Find industry-specific averages for the ratios above**

**Section 5:** Discuss the problems found. BE CERTAIN TO DESIGNATE THE "SALIENT" PROBLEM AND EXPLAIN WHY IT IS SO!

**Section 6:** The Strategic Alternatives/Solutions, along with the advantages and disadvantages of each. Also address the logic and feasibility of each. (For purposes of this course, you must have at least three (3) mutually exclusive alternatives).

**Section 7:** Give your recommendation and explain why!

**Section 8:** DETAIL your recommended plan of implementation. This should be an activity plan, not general ideas.

**Section 9:** Present the citations, in an acceptable form, from all source material utilized.

**Section 10:** Appendices (graphs, charts, and any additional information that assists in getting across your ideas. MAKE CERTAIN TO ENCLOSE A "HARD COPY" OF ALL YOUR VISUALS (REPORT SIZE PAPER -

PAPERS WILL BE TYPED (WORD-PROCESSED),  
DOUBLE SPACED ORIGINAL COPIES. APPEND  
MATERIAL MAY BE "COPIES" (CLEAN COPIES ONLY).

# ORAL PRESENTATION

1. PROFESSIONAL DRESS: (Suit & tie or Sport Coat & tie for Males; appropriate business attire for Females).
2. VISUALS: A sufficient number to depict all sections on the format and to make your points.
3. Present the MISSION and the OBJECTIVES, along with support and the analysis of each.
4. Present the THREATS and OPPORTUNITIES, along with the necessary support.
5. Present the STRENGTHS and WEAKNESSES, with support.
6. Present your FINANCIAL ANALYSIS. (Minimum of a financial summary and at least two financial ratios for each group. Explain what each ratio shows.)
7. Present the following:
  - The Strategic Advantage Profile
  - a. Value Chain Analysis
  - b. Tangible Resources
  - c. Intangible Resources
  - d. Capabilities
  - e. Core Competences
  - f. Business-level strategy (identify and describe)
  - g. BCG Growth Matrix
  - h. Competitive Analysis
  - i. Competitive Dynamics
  - j. First mover, Second mover, Late Mover
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  - l. Corporate level strategy
  - m. Level of diversification
  - n. Mergers, Acquisitions and Takeovers
  - o. International Strategy (Outsourcing, Alliances, Cooperative Strategy)
  - p. Corporate Governance - Agency problems
  - q. ANY other ANALYTICAL TOOLS in your textbook
8. Present the PROBLEMS found. Be certain to clearly depict the SALIENT PROBLEM that you propose to resolve.
9. Present your STRATEGIC ALTERNATIVES and address the advantages and disadvantages, as well as the Logic and Feasibility, of each. (You are required to generate a minimum of three mutually exclusive alternatives).
10. Give your RECOMMENDATION and explain WHY!

11. Explain your PLAN OF IMPLEMENTATION: (Be Specific, this is an activity plan, not general concepts.)
12. Discuss your recommended EVALUATION & CONTROL PROCEDURES for your plan. (If not included in the plan itself.)
13. Upon concluding your presentation, call for QUESTIONS. The team will then field questions from the audience.

"All members of the group must present some portion of the analysis. If any member fails to do so, he/she will receive a "ZERO" for the oral assessment."

## **THE RULES**

- 1. Meet and cooperate with your group**
- 2. You have 15 minutes for your presentation.**
- 3. Minimum number of slides (20). However, I would avoid constructing the minimum amount of slides. You are encouraged to significantly exceed the minimum.**
- 4. Business Attire**
- 5. BE CREATIVE. Use graphics, animations, audio, flash, etc.**
- 6. Develop a compelling presentation.**
- 7. NO READING the presentation**
- 8. NO READING the presentation**
- 9. Maintain eye-contact with the audience**
- 10. Practice your presentation before it is delivered in class**
- 11. To avoid technical glitches/problems you are encouraged to bring your own laptop. If you have a presenter, bring it.**
- 12. To avoid technical glitches/problems you are encouraged to save your presentation on at least two (2) separate/different types of media. (e.g., USB flash drive and CD or on your laptop hard drive and USB flash drive.**

# **13. NO READING the presentation**