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Managerial Accounting – Case Guidelines

Overall, you are responsible for three formal case analyses. These three analyses will be performed in assigned groups.

Your analyses should be represented by a written report. Quantitative analysis should accompany your report in the form of appendices represented by tables, figures, etc.

The text-based portion of your report is limited to 3 pages (this limit does not include the quantitative appendices), and should be double-spaced using 12-point font and 1-inch margins. Note that you need not use the entire 3 pages of text.

Further, your entire report – including appendices – should be submitted in a single file – a MS Word file, preferably. That is, please do not submit a separate MS Excel file containing appendices; everything should be included in a single report, presented as it should be viewed / read.

The page limit is to ensure that you are conveying the most pertinent information in the most effective and efficient way. This models a common aspect of “real-world” scenarios in which superiors in a professional setting are looking for a summary, rather than a detailed analysis of every calculation you performed.

Other guidance:

1. You should adopt the role of an outside consultant (unless an alternative role is suggested in the case).
2. Suggested assignment questions should guide your analysis. That is, questions provided in the case itself are useful in identifying key issues. However, addressing them as if they are homework problems would be inconsistent with your role as the consultant.

Some implications of this comment are:

- a. You should **not** “label” your analysis according to question number.
 - b. In communicating your analysis, it may not make sense to address the questions/issues in the order in which they are provided. If you identify and address some overall/all-encompassing factor or issue within the case, you should organize your report appropriately.
 - c. Your overall analysis should not be “limited” by these questions. If you identify other issues/factors, you are strongly encouraged to discuss those.
3. Assume the user of your analysis is informed about the scenario. That is, you need not re-iterate the case facts or provide “background” information. However,

assume they know relatively little about managerial accounting and related issues. In other words, your report should explain (i) the assumptions you made, (ii) your analysis in enough detail that a user can follow it, and (iii) the implications of your analysis (e.g., recommendations, etc.).

One caveat – no one (not even an accountant) wants to read a text-based description of specifics about the analytical process or every quantitative detail you calculate. So, use appendices to communicate the details of your process. Put another way, your report should not contain sentences like, “First, we organized the costs via whether they could reliably be categorized as fixed or variable costs”, etc.

Overall, you should provide an in-depth, professional analysis that demonstrates your consideration and legitimate comparison of multiple perspectives, and a justifiable recommendation (to the extent that case information and reasonable assumptions allow).

If you have questions, please do not hesitate to contact me.



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