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Further Instructions & Specifications

In addition of these Final Exam Instructions, please strictly follow the “**Structure of Final Exam Case Analysis Report**” enclosed in the end of this document for specific sections and exhibits to include in your case analysis report. **Within the case, possible issues, questions, opinions, and even courses of action may have been provided. You may choose to use them or not based on your own judgment; you do not even need to agree with them. Please remember that the creative thinking and unique thoughts shown in your strategic alternatives are key to developing an excellent case analysis report.** Keep in mind that your task is to conduct strategic analysis for the company following the provided guidelines, not to resolve a particular issue raised in the case (e.g., a particular debate or an innovation project proposed in the case), even though they might be highly relevant to your analysis.

The paper (excluding all exhibits and title pages) must be put on a **maximum of three pages in single-space with 12-point Times New Roman font and one-inch (2.54cm) margins on all sides**. No text beyond the three pages will be taken into consideration for the grading purpose. The body text of the paper should all be presented in **bullet points format only**, no paragraphs and lengthy sentences (e.g., **over two lines**) are accepted (subject to 5% penalty otherwise). The sub-points belonging to a major bullet point, if you use this format, can be put in a smaller 11- point font. Please use the same section headings such as “External Assessment” as given in the “**Structure of Final Exam Case Analysis Report**”; do NOT create other headings. Papers that grossly violate guidelines will receive a failing grade or serious penalty at the instructor’s discretion. Please keep an eye on spacing between lines (keeping everything single-spaced), so you can save some space for text. The most important thing is to get it done right (nice and clear and concise), not to elaborate on your points too much.

Late papers will be penalized as follows: Ten percent points will be deducted for each 24-hour period (or part thereof) of being late (To clarify: “part thereof” here means ten percent will be deducted for papers that are late by a few minutes, half an hour, or one hour, etc. up to 24 hours). Exceptional circumstances that might affect a student's ability to meet this deadline must be brought to the instructor's attention prior to the deadline. Extensions may be given to students with university-approved reasons, such as disability.

External Research

You are not required to conduct any further external research on the company and its industries. Be sure to provide references on a separate page for any search *before* the time of the case and attach this page at the end of the paper. This page may contain only references and can be in addition to the text-pages and exhibits.

Continue to see the Structure of Final Exam Case Analysis Report”

Structure of Final Exam Case Analysis Report (Summer 2020 D01 only)

Note: These guidelines are intended to help you get the structure right on the case report; meeting them does not guarantee a quality work. Please use the same sections headings (e.g., Key Issues, Current Strategy, etc.) in your paper. Please insert **only bullet points** (including short sentence) for each section; each point shall be **no more than two lines** (3-5 words beyond the second line is acceptable in rare cases). If you choose to fill in your points directly on this template, please make sure you **remove all instructional words (other than the section titles)** for clear presentation.

Limit the text to 3 pages (12 font, single-spaced, 1" (2.54cm) margin on all sides), excluding cover pages, tables and exhibits.

Key Issues (preferably 3-6 issues each in one bullet point;)

- Obvious and pressing issues, hidden problems, and long terms challenges **facing the company**. These issues set a direction in terms of where your strategic alternatives should focus. Please describe them (and number them) in order of importance.

External Assessment. Top Three most important opportunities/threats in total, not three each. A table of external analysis (no need to include in the report) will be highly helpful for you to identify good opportunities and threats.

Note: focus on the **strategic group** of which the focal company is a member, NOT the case company. Do NOT give recommendations here as to what firms can do or should do with respect to these opportunities and threats.

- One sentence describing the strategic group (similar strategy and competitors)
- Opp/threat #1: One sentence that clearly specifies the **opp/threat** for the strategic group; 1-2 bullet points following the sentence to provide **evidence** for the opp/threat
- Opp/threat #2: ditto
- Opp/threat #3: ditto

Internal Assessment. Top Three most important strengths/weaknesses in total, not three each.

- Str/weakness #1: One sentence identifying the strength/weakness; 1 subpoint providing evidence; 2-3 separate bullet points reporting the V, R, I evaluation of the strength. If it is a weakness, 1-2 points to discuss whether it can be transformed into a strength in the future.
- Str/weakness #2: ditto
- Str/weakness #3: ditto

Financial Diagnosis – Exhibit 1 for this section

- 3-6 bullet points to interpret the ratios in the Exhibit 1. Use various comparisons (e.g., temporal changes) and financial ratios to diagnose the company's financial situation. Remember to comment on the company's overall financial health and capacity to carry on future investments that might be part of your strategic alternatives.

Current Strategy

Note: focus on what the company is *currently* doing; do NOT discuss what it can or should do in the future

- Business strategy (one sentence defining the strategy such as differentiation, followed by 1-3 bullet points of explanations)
- Functional strategy (2-3 separate points for major functional practices such as marketing initiatives);
- Global strategy and corporate strategy, etc, whenever applicable

Implementable Strategic Alternatives (a total of **TWO** alternatives; the most important section!)

Note: (1) Business level strategies are expected, while corporate level strategies are accepted. Please do not propose functional level strategies (HR, marketing, etc.) as explained in Chapter 4, which focus on operational changes that aim to improve *internal* efficiency and effectiveness. (2) Business strategies represent major moves in the way the company competes on the market. They often involve significant investments or divestments that carry long term impact on the company's competitiveness. These strategies are *externally* oriented, often answering the question of what to serve, who to serve, where and how to compete. (3) Business level strategic alternatives, often developed based on existing/potential strengths/weaknesses and available environmental opportunities/threats, should deal with key issues (including the pressure for growth). (4) Two alternatives need to be significantly distinctive, yet they all need to generate significant revenue or market growth to the company, which means that simply divesting (stop doing) something may not suffice. (5) Both strategies should go beyond a general goal (e.g., international expansion) and discuss what the company needs to do exactly. (6) Both alternatives should be plausible and appealing, supported with solid reasoning and strong arguments. Note that **using status quo or current strategy (that is, continue to do what has been doing) as an strategy alternative demonstrates weak creativity; I need to see your OWN original ideas.** Selling off the company is not an option of strategy in the exam.

- Alternative #1: One sentence specifying the strategy, followed by 3-5 bullet points of explanations of what it is exactly and why it is considered a good strategy, with respect to the analysis in previous sections
- Alternative #2: ditto

Criteria and Evaluation of Alternatives by Criteria (second most important section) – Exhibit 2-3 for this section

- One sentence to list 3 criteria (e.g., NPV), and 1-2 sentences to **justify** your choice of these criteria (that is, why these, not others?)
- Then, separate points in correspondence to the three criteria, each point using one criterion to compare the two alternatives with clear conclusion (which one is better) and justifications (why).

Recommendation and its Implementation

- 1-2 points to summarize the evaluations and recommend one strategy based on the evaluations
- 1-2 points to discuss major issues/challenges regarding the implementation of the strategy
- 1-2 points to discuss the limitations of the recommended strategy with respect to the identified key issues. Offer suggestions on possible solutions if you can.

Exhibits (append all exhibits to the end of the paper in the following order)

- Exhibit 1: Financial Analysis. A table that presents financial ratios of multiple categories, such as profitability, leverage, liquidity, etc., as well as any useful historical comparisons such as sales increase/decrease. No specific ratios are mandatory. All depends on your analysis and needs.
- Exhibit 2-3 (**optional, with bonus**): Two Exhibits of NPV corresponding to the two strategic alternatives respectively; put key assumptions, with brief justifications, either at the bottom of the

tables or on a separate page. Please refer to the Westover Inn case in your case package for a template of NPV.



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