# Student Handbook

# BADM 76W~Analysis of Business Issues

# A Writing in the Disciplines (WID) Course

The George Washington University

School of Business

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Page

Introduction 2

Format of the Course 3

Learning Objectives 4

Methods of Communication 4

Critical Thinking 5

Revision and Feedback (Peer Review) 5

Research and Analysis 6

Career Management Strategy 6

Business Terminology 7

Assignments 7

Three Papers 7

Paper 1 8

Paper 2 8

Paper 3 8

Ten Responses 9

Business Letters 9

Memos 9

Corporate Social Responsibility 9

Issues, Reasons and Conclusions 10

Resumes and Cover Letter 10

Quality 10

Ethics 11

Financial Analysis 11

Strategy 11

Current Events 12

Grammar and Punctuation 12

Tips on Writing 12

Plagiarism and Academic Integrity 15

Guidelines (Prompts) 15

Appendix 16

# BADM 76W, ANALYSIS OF BUSINESS ISSUES

# WRITING HANDBOOK

**Introduction**

In 2002, the Executive Vice President for Academic Affairs of The George Washington University, Dr. Donald Lehman, determined that writing by students should be an area on which to place strategic excellence. Freshmen were required to take the obligatory first-year courses (UW20~University Writing), but the administration realized that writing is a process, not a product; therefore. As one faculty member put it, “Writing is not an inoculation.” Writing skills are not something a student acquires in one semester. Writing is not easy. Expressing a series of coherent thoughts on a written page (or computer screen) is challenging. Nevertheless, the ability to do so is important for long-term professional success. Therefore the administration decided that students would benefit from additional writing courses as they settled into their majors ─ i.e. *writing in their discipline*.

According to The College Board, “Writing is a ‘threshold skill’ for both employment and promotion, particularly for salaried employees.” The publication goes on to state, “Eighty percent or more of the companies in the service and finance, insurance, and real estate (FIRE) sectors, the corporations with the greatest employment-growth potential, assess writing during hiring.”[[1]](#endnote-1)

Consequently the Writing in the Disciplines (WID) program was developed ― a comprehensive curriculum which spans the various schools. There are WID classes in the Schools of Engineering, Psychology, History, Interior Design, and yes, The School of Business Administration. Regardless of the school, the WID charter calls for focus on four goals.

**1. *Writing throughout the term.*** WID courses are not *writing* courses, they are *writing intensive courses.*

**2. *Writing for different purposes and audiences.***

**3. *Revision, Rewriting, and Peer Review.*** Writing is an iterative process. One way to become a better student is to become a teacher. Peer review provides that experience.

**4. *Develop the conventions of writing in your discipline.***

The purpose of this handbook is to elaborate on these and other goals and requirements of BADM 76W, *Analysis of Business Issues*, a WID course for sophomores in the GWU School of Business.

# Format of the Course

Beginning with the fall semester of 2010, BADM 76W will be a required course for all sophomores in the School of Business. With a sophomore class of almost 400 students, there will be two sections each term with a maximum of 105 students each. One section will meet as a full-class on Mondays with seven writing labs of fifteen students each on Wednesdays. The other section will follow an opposite format: full-class on Wednesdays, writing labs on Mondays. The full-class will be a lecture conducted by the section’s Professor who will be from the School of Business. Writing labs are managed by Graduate Teaching Assistants (GTAs) who are typically English majors working on masters or doctorate degrees in the College of Arts and Sciences

Full-class lectures are taught by instructors from the School of Business Administration. They set the stage for future writing assignments, and will be on a variety of business concepts: functions of management, financial statements, ethics, corporate social responsibility, strategy, quality, case studies, etc. These lectures lay the groundwork for the writing assignments which follow ― in other words, for Writing in the Discipline.

The writing labs provide the student an opportunity to hone their skills and develop the tools necessary for coherent writing. As mentioned above, writing labs are conducted by Masters Degree and Ph.D. candidates. They are a combination of lecture, in-class exercises, participation, and Blackboard Learning Modules. The labs afford an opportunity for students to become engaged with the material as they work on format, style, and critical thinking. Attendance and participation is very important, and is a substantial portion of the lab grade.

Overall, the writing assignments can be classified as three Papers (approximately four, six, and eight pages respectively), and ten Responses (approximately 500 words each). Details are provided in the Assignments section below.

# Learning Objectives

In addition to the four WID goals mentioned above, there are several objectives that are specific to BABM 76W, Analysis of Business Issues. Among these are the following.

**Methods of Communication**

Analysis of Business Issues is a writing-intensive business class. In this class, we will introduce you to the mechanics behind different forms of communication in business settings. Furthermore, we will expose you to a variety of business concepts. We do not expect you to develop a thorough understanding of the business concepts solely from this class. However, this introduction will prepare you to gain a better understanding as you delve more deeply into the functional areas of business in future courses, and writing is a good way to reinforce what you are learning. Written communications, such as business letters, memos, e-mails, analytical reports, proposals, and presentations to groups, including the Board of Directors, potential investors, employees, and other stakeholders, are the lifeblood of a business.

**Critical Thinking**

In remarks to the Commonwealth Club of San Francisco in 2003, Michael Crichton, author of *Jurassic Park* and other best-selling novels, began by saying:

I have been asked to talk about what I consider the most important challenge facing

mankind, and I have a fundamental answer. The greatest challenge facing mankind is

the challenge of distinguishing reality from fantasy, truth from propaganda. Perceiving

the truth has always been a challenge to mankind, but in the information age (or as I

think of it, the disinformation age) it takes on a special urgency and importance.[[2]](#endnote-2)

Perhaps what Mr. Crichton was advocating could be called *critical thinking* ― or as the authors of one of the texts put it, the “ability to ask and answer critical questions at appropriate times.”[[3]](#endnote-3) Critical thinking consists of identifying the issues, conclusions, and reasons of an argument. It requires examining ambiguities and value assumptions, and distinguishing problems from symptoms in a business setting. Critical thinking is an essential component of writing assignments in this course.

**Revision and Feedback (Peer Review)**

In business, your success depends greatly upon the success of those with whom you work. As a manager, you will be judged by the performance of those you manage. Providing effective feedback is essential to help your colleagues and subordinates continue to improve. It has been said that the best way to master a subject is to teach it. Sometimes there are deficiencies that must be addressed to help the one being reviewed improve. If a paper you are reviewing has problems, you need to detail those to the author. Part of your success in this class depends on your ability to help others succeed. Most authors will agree on the necessity of rewriting and revision. Students are provided with guidelines for their peer review.

**Research and Analysis**

Although BADM 76W does not require a “research paper” in the traditional sense of American Psychological Association (APA), Modern Language Association (MLA), or Turabian style, the course does address research and analysis through two venues: case studies and company analysis. It is important to distinguish problems from symptoms in a business setting, and a short case study is provided to illustrate this concept. For the company analysis, students are asked to pick a publicly traded company and assess its performance using a variety of metrics: mission and strategy; profitability; liquidity; return on assets and equity; top management performance; stock performance; strengths, weaknesses, opportunities, and threats (SWOT). Details are provided in the Assignments section below.

**Career Management Strategy: Fowler Career Center**

It is important to build effective job search skills and to enhance current employment and recruiting knowledge to meet career and job search goals. The George Washington University Career Center offers a wide range of services, including a strong consulting program for current students. GWU makes a significant attempt in the student’s freshman, sophomore, and junior years to provide assistance in career guidance and counseling. Freshmen are required to take two sections of First Year Development Program (FYDP) courses, BADM 001 and 002. The effort continues and is further refined for sophomores in BADM 76W.

The class features a Fowler Career Center guest lecturer ─ a professional career consultant with extensive experience working with students in the areas of career development, employment advising, internship preparation, interviewing, and document preparation. One assignment is to develop a professional quality personal resume and cover letter. A resume is a marketing tool written to persuade a specific employer that you have the experience, skills, abilities, education, personal qualities or potential to fill a particular position. An effective resume displays your achievements, experience, and attributes to the best advantage while minimizing any possible weaknesses.[[4]](#endnote-4)

**Business Terminology**

Mastering thevocabulary is an important aspect of any discipline. Terminology in many courses ─ law, medicine, economics, engineering ─ may appear to be esoteric. Understand the word and you understand the concept. The full-class lectures lay the groundwork for the writing assignments and will address business concepts and terminology. The following list provides a few examples.

● Benchmarking ● Time Based Competition

● Just In Time ● Theory X, Theory Y

● Hierarchy of Needs ● Total Quality Management

● *Kaizen* ● Statistical Quality Control

● Productivity ● Therbligs

● Six Sigma ● ISO 9000

# Assignments

As mentioned earlier, the full-class lectures set the stage for the assignments. For example, a Monday lecture on strategy would precede the corresponding written response due in the lab session on Wednesday of the following week ─ about nine days later. Assignments are submitted to the Writing Lab GTAs, and fall into two categories: Papers (of which there are three); and Responses (of which there are ten). Details are given below.

**Three Papers**

The three papers required for the class are described below. Guidelines (prompts) are provided for each, and they are to conform to one of the styles such as APA, MLA, or Turabian. Examples of several prompts are provided in the appendix.

**Paper 1 (10%, 4-6 pages): A short case analysis.**

Typical case studies involve analyzing a business situation to determine the major problem facing a company, identifying various alternatives, and recommending a course of action. Students are given a short case study to analyze. A guideline (prompt) for a case analysis is provided in the appendix.

**Paper 2 (20%, 4-6 pages): Case study with peer review.**

For this assignment, half the class is assigned one case and half the class is assigned another. Students write a draft analysis of their case and exchange it with another class member who has been assigned the other case. Each student will review their classmate’s work according to a furnished guideline, return it to them, and receive their draft back. After making revisions, the final product will be submitted to the GTA. (See the subtopic on *Revision and Feedback: Peer Review* above)

**Paper 3 (25%, 6-8 pages): Analysis of a company, with peer review.**

Students will have the opportunity to choose a publicly traded company and evaluate it as a potential investment opportunity. Students who do not pick a company by the deadline given will be assigned one by the instructor. Guidelines are provided. Some of the major issues to be considered are the following:

1. Is there a major issue to be addressed? (Example: Toyota and their brakes; Apple and Steve Job’s health)
2. Assessment of their mission/vision. (Is it fluff or a real guide?)
3. Assessment of the performance of the CEO and top management. (Longevity? Ethics? Lawsuits?)
4. Assessment of the *5-Forces Model of Competition* (From class lecture on strategy).
5. Assessment of the *5 Generic Strategies*. (From class lecture on strategy).
6. SWOT analysis (Strengths, Weaknesses, Opportunities, Threats)
7. Assessment of financial performance. (From class lecture on analyzing financial statements and investing).

**Ten Responses** **(2-4% each)**

Participation in the writing labs and the ten responses are worth a combined 40 percent of the overall grade. To a certain extent, the weight of the various responses and participation in the labs is left to the discretion of the GTA. However, as a rough guide, class participation would total approximately 20 percent, and the ten responses about 2 percent each. Lectures in the full-class generally address the topics of the responses, and the written assignments are due about nine days later. The following are examples of various response topics:

**Business letter.**

Although e-mail has reduced the use of the formal business letter, it still is an important means of communication. In Response 1, students are given a complaint letter written by a customer who has just purchased a new car and is extremely unhappy with the service she has received. The assignment is to write a business letter responding to the customer’s complaint. The prompt for this assignment is provided in the appendix.

**Memos.**

Memos are typically used for brief, less formal communications, but there is a protocol which separates the pros from the amateurs. For example, memos are initialed, not signed. Some responses require a cover memo, and examples of the format can be found in the appendix.

**Corporate Social Responsibility.**

According to Nobel Laureate Milton Friedman, “The social responsibility of business is to increase its profits.”[[5]](#endnote-5) On the other hand, some texts describe social responsibility as management’s acceptance of the obligation to consider profit, consumer satisfaction, and societal well-being of equal value in evaluating the firm’s performance.[[6]](#endnote-6) Students are provided articles on Friedman and Microsoft’s Bill Gates as resources for this assignment.

**Issues, Reasons, and Conclusions.**

A major aspect of critical thinking is asking the right questions. What is the issue? What is the conclusion? What are the reasons supporting that conclusion? Are there any fallacies in the reasoning? Are there any ambiguities, or value assumptions? Recent op-ed pieces provide background for this assignment, and students are asked to write an analysis identifying the concepts mentioned above.

**Cover Letter and Resume.**

GWU is very interested in assisting students in their career development. Employers may not hire you on the strength of your resume alone, but it is a certainty they will not hire you if you have a poor one or none at all. The Career Center provides a guest lecturer to offer guidance in preparing quality cover letters and resumes. See the section on the Fowler Career center below.

**Quality.**

One has only to visit the local bookstore to see that buzzwords and management fads come and go in business. As U.S. manufacturers of automobiles, appliances, and machine tools continued to lose market share in the 70’s and 80’s, lack of *quality* received most of the blame. The selection of books reflected the trend, and three individuals that achieved prominence were W. Edwards Deming, Joseph Juran, and Philip Crosby. By promoting Statistical Quality Control (SQC), Deming and Juran became known as the “brains of quality.” The less technical Crosby, on the other hand, was the “friendly uncle.” Quality, like art, may be hard to define ─ “I know it when I see it”. According to Crosby, quality is “conformance to requirements.”[[7]](#endnote-7) This assignment requires students to pick a product and address its quality using the concepts provided by Deming, Juran, and Crosby.

**Ethics.**

Examples of questionable conduct in business are plentiful: Enron; Worldcom; Tyco; Bernard Madoff, and others. According to Boone & Kurtz, business ethics is the standard of conduct & moral values that determine actions and decisions at work.[[8]](#endnote-8) Students are given a case study describing an ethical dilemma and asked to recommend a course of action.

**Financial Analysis.**

There are several specialties in accounting (cost, tax, auditing, etc.) and many different financial statements. BADM 76W focuses on what is known as “managerial accounting,” and concentrates on analyzing only two financial statements: the balance sheet and the income statement. Statements for two years are examined to determine if changes in ratios are up or down, good or bad? This assignment serves as background for Paper 3~Company Analysis. The prompt is provided in the appendix.

**Strategy.**

Strategy is part of planning, which is the first and possibly the most important of the five functions of management: Planning, Organizing, Staffing, Coordinating and Controlling. Strategy supports the vision and mission statements of an organization, and addresses the following questions: Where are we now? Where do we want to go? How will we get there? Strategy provides a game plan. It addresses how to increase market share, respond to changes, enter new markets, make acquisitions, and addresses the organization's Strengths/Weaknesses/Opportunities/Threats (SWOT). Strategy is important because a focused organization is more likely to be a strong bottom-line performer. It is a core management function, and is often the key to success and survival.

Strategy also requires management to examine the competitive forces their company faces on five fronts: 1) From competitors; 2) From the threat of new entrants; 3) From suppliers; 4) From substitutes; and 5) From customers. Likewise, managers must decide whether to approach the market from a position of low cost, broad differentiation, or focused differentiation.

For this assignment students are asked to assume that they are the new marketing manager for a product, and are to examine the competitive forces mentioned above and recommend one of the generic market approaches.

**Current Events.**

This assignment is an attempt to engage students in the periodicals of business: *Business Week, Fortune, The Wall Street Journal, Forbes, The Economist,* et al. The requirement is to locate an article of interest and submit an analysis along with a cover memo.

# Grammar and Punctuation

Weekly Writing Modules are used in Blackboard to assist the student in improving grammar and punctuation. The following are examples of topics:

● Uses of commas

● Uses of colons, apostrophes, and quotations

● Misplaced modifiers

● Pronoun-antecedent agreement

● Summarizing, paraphrasing, and quoting

Here is a sample question from one module: Which sentence is correct?

□ W. Somerset Maugham points out that perfection has a significant defect, "It is apt to be dull."

□ W. Somerset Maugham points out that perfection has a significant defect: "It is apt to be dull."

# Tips On Writing

Students in BADM 76W are encouraged to use outside resources to develop their writing skills. While there are many resources on the craft of writing, one of the best is William Zinsser’s *On Writing Well.* In the opening chapter the author describes a panel discussion in which he is teamed with a certain “Dr. Brock,” a physician who writes as a hobby. The following table summarizes questions from the audiences and the replies from Zinsser and Dr. Brock.

**Summary of a panel discussion with William Zinsser and “Dr. Brock.”**

|  |  |  |  |
| --- | --- | --- | --- |
|  | Question | **Dr. Brock’s**  **Response** | **William Zinsser’s**  **Response** |
|  | What is it like to be a writer? | “Tremendous fun . . . the words just flowed.” | “. . . **writing wasn’t easy** and it wasn’t fun. It was hard and lonely, and the words seldom flowed.” |
|  | Is it important to **rewrite**? | “Absolutely not. Let it all hang out.” | “. . . **rewriting** is the essence of writing. . . professional writers **rewrite** their sentences repeatedly, and then **rewrite** what they have rewritten” |
|  | What do you do when it’s not going well? (What’s this commonly called?) | “. . . put the work aside for a day when it would go better.” | “. . . establish a **daily schedule** and stick to it . . . writing is a craft, not an art.” |
|  | What do you do when you’re depressed or unhappy? Won’t that affect your writing? | “Probably it will. Go fishing. Take a walk.” | “Probably it won’t. . . If your job is to **write every** **day**, you learn to do it like any other job.” |
|  | Do you put **symbolism** in your writing? | “I *love* symbols!” | “**Not if I can help it** . . . I have an unblemished record of missing the deeper meaning of any story, play, or movie.” |

**“Write As Well As You Can”**

Writing well may not come easy to you, but Zinsser encourages you to “write as well as you can.” In the movie *A League of Their Own*, Dottie (Geena Davis) has decided to quit the female baseball team and says to her coach, Jimmy Dugan (Tom Hanks): “It just got too hard.” To which Dugan replies, “It's supposed to be hard. If it wasn't hard, everyone would do it. The hard... is what makes it great.”

**Outline**

The typical 500-word college paper will have a topic sentence (may also be called a thesis statement or research question), two or three major points, and a conclusion. An outline does not have to be complicated, as illustrated below:

● Topic Sentence

► Point #1

► Point #2

● Conclusion or Summary

The appendix includes a section on formulating a research question.

**Focus**

In this writer’s first college English course the professor assigned the following topic for the first in-class writing assignment: “How do the arts improve humanity.” A quick check of the dictionary (bringing one to class was a requirement) revealed that the arts included all of painting, sculpture, poetry, music, dance, and architecture. Everyone wrote furiously for an hour. When the papers were returned next class, everyone received an F. “Don’t sweat the grade; this one doesn’t count,” said the teacher. “I did this to make a point, which is that this topic cannot be covered in 500 words, or even 10,000. It is too broad. You need to focus.”

**Read**

Another good resource is Stephen King’s *On Writing*. While his book is substantially biographical, King echoes Zinsser in several respects, particularly the following: rewrite, and then rewrite; establish a daily schedule (King’s goal is ten pages per day); write every day (even Thanksgiving and Christmas). He also emphasizes the importance of reading, and includes a list of the eighty books he read during the year he spent writing *On Writing*.

Finally, it is possible to visit the homes of many American authors ─ Hemingway’s home in Key West; Sandburg’s in Flat Rock, North Carolina; Faulkner’s in Oxford, Mississippi. They all have at least two things in common. The first is a place to go and write. Hemingway’s was a room above the garage which was separate from the main house and only accessible by a rickety walkway from the second floor of the main house. Few visitors were willing to chance crossing that bridge. It is said that the door to Faulkner’s writing room had a door knob which he removed and took with him when he entered. Sandburg wrote at night in an upstairs room. In the morning he would greet his wife from the window as she left to tend her prize-winning goats. Second, the walls are covered with shelves holding hundreds, if not thousands, of books.

# Plagiarism & Academic Integrity

Plagiarism is when you use someone else’s thoughts or words in your writing and do not give them credit for it. Since this is a writing course, we take plagiarism very seriously. Proper citations and a reference page must be provided for all written assignments. Some written assignments will be posted to Blackboard and will be subject to Safe Assign, a program that checks for plagiarism. The penalty for plagiarism can be as extreme as being reported to university officials, or as minor as receiving a “0” for the assignment.

**Code of Academic Integrity**

Students should be familiar with the GWU Code of Academic Integrity. A copy of the code is available in the GWU Bulletin, and more information about GW’s Code of Academic Integrity can be found at <http://www.gwu.edu/~ntegrity/code.htm/>. Commitment to academic honesty is crucial; therefore, cheating, fabrication, and plagiarism are strictly forbidden.

# Guidelines (Prompts)

Examples of Guidelines ─ also called Prompts ─ for several responses are provided in the Appendix.

# Appendix

Page

Guidelines (Prompts)

Guideline for Response 1~Complaint Letter 17

Guideline for Response 8~Financial Analysis 19

Guidelines for Paper 1~Case Analysis 22

Formulating a Research Question 25

Grading Rubric 27

Guideline for Response 1~Complaint Letter

# BADM 190W~Guidelines for Response 1~Complaints

**Background**

One of the challenges in business is handling customer complaints. We hear the adage, “The customer is always right!” But, is the customer always right? No. But, the customer is always ― *the customer*. Businesses need to be aware of the time-value of a customer. Someone requiring $40 worth of prescription drugs per month generates almost $500 per year revenue for a pharmacist, year after year. If not handled properly, a dispute over a $10 over-the-counter misunderstanding could be costly in the long run.

**For your assignment**

Assume you are the Vice President of Sales for DC Photon, Inc., a premier Photon car dealership located at 1957 E Street NW, Washington, DC 20010. Attached is an email from an irritated customer, Janet Greenman.

Using the materials provided in the class text, *The Business Writer's Companion*, prepare a business letter reply to Janet Greenman. If you want to research various sources for recommendations on handling complaints, feel free to do so. Just be sure and give credit (citation) where credit is due.

One source offers the acronym **TACTICS** as a guide for handling complaints. **T**hank you. **A**pologize. **C**ollect information. **T**ake action. **I** will put this right. **C**heck that the customer is happy. **S**ummary.

**Presentation**

● 1” margins on all sides

● 11 or 12 point font

● Single spaced with double spacing between paragraphs

● If you care to develop a letterhead or logo for DC Photon, feel free to do so.

● If appropriate, include the proper use of APA or MLA in-text citations, plus a separate Reference page at the end. More information is given at: <http://libguides.gwu.edu/styleguide>.

● Include your name, date, and course name

● A hard copy is due to your Breakout Session Leader on Wednesday, January 20, at the beginning of class.

Guideline for Response 1~Complaint Letter

To: [you@dcphoton.com](mailto:you@districtphoton.com)

From: [janie@myisp.com](mailto:janie@myisp.com)

Date: December 31, 2010

On November 1, 2010, my husband and I were thrilled to become the proud owners of a brand new MXV Photon Hybrid SUV. We had test-driven a Photon, but the one we drove didn’t have the options we wanted. So, your salesman, Ted Nohnaim, showed us that you did have a different color with the right options in stock.

When we began to drive our new car, I became quite concerned with some very strange noises that came from the wheels when we depressed the brake pedal. Plus, the car just felt wrong when we braked. I discussed the problem with John Adams in your service department, and he assured me that there was nothing to worry about. After listening to the sound for two days and feeling the strange action every time I pressed the brakes, I was very concerned. So, I brought the car in. Mr. Adams still assured me that there was no problem. I drove the car another day, and I just knew something was not right. I came back in and pleaded with Mr. Adams to check it out.

After a condescending glare, he took my car back and was surprised to discover that the brake pads were warped. I do think that is a problem about which I should be very concerned. Furthermore, I am quite disappointed that (a) no one found the problem before the car was delivered to me, and (b) Mr. Adams treated me as if I were an uninformed, hysterical female.

Of course, the car had to have the brake pads replaced. When we picked it up two days later, we heard a disturbing rattle in the door. Once again, Mr. Adams couldn’t hear the sound at all and dismissed me with a wave of his hand. I was frustrated and asked for the service manager. Bob Superheerow rode with me and heard the problem right away. He sent the car back to the service area with instructions to correct the problem.

Unfortunately, when I picked it up the next day, I found that the paint had been chipped on the door that had been repaired. Mr. Adams claimed that I must have chipped it myself. The truth is that, at this point, your dealership had put more miles on my new car than I had! I was very frustrated and just wanted to have a big “do-over” on the car purchase.

I am at my wit’s end. I am very disappointed with Mr. Adams’ treatment, with my new car, and with your dealership. I feel like you owe me free service for life and a new paint job. It has been an awful experience to deal with your establishment, and rest assured, I will encourage all of my friends and colleagues to go anywhere but your dealership the next time they want to buy any cars you sell. I am also sending a copy of this letter to your national headquarters.

You have taken what should have been a great experience and turned it into a nightmare.

Sincerely,

Janet Greenman

Guideline for Response 8~Financial Analysis

# BADM 190W~Guidelines Response 8~Financial Statements

**Background**

Lecture 8 covered financial statements and their analysis. As pointed out in class, one of the questions to bear in mind when analyzing financial statements is, “How is this company doing?”

**For your assignment**

There is an income statement and a balance sheet for Shisa Wasabi Company in the class notes and at the end of this prompt. Assume you are in the Investments Department of a large company. Your supervisor, Kim Goyal, has asked you to examine this company as a possible opportunity for investing $500,000. Using the materials provided and the class lecture, write a 500 (+/-) word response with your recommendation. Remember from the B&K text: Issue, Conclusion, and Reasons. Use tables or charts as you feel necessary. Bear in mind that Kim is a busy person and believes decisions can be made if two or three major points are known.

**Presentation**

● Cover memo (see page 2)

● Analysis/report (2-3 pages)

● 1” margins on all sides

● 11 or 12 point font

● Single spaced with double spacing between paragraphs

● Use subtitles if you feel they are appropriate

● Page numbers in the center at the bottom

● Include the proper use of APA or MLA in-text citations, plus a separate Reference page at the end. This information will be covered in classes before your final paper is due; however, full information is given at: <http://libguides.gwu.edu/styleguide>.

● Include your name, date, and course name

● A hard copy is due to your Breakout Session Leader on Wednesday, March 31, at the beginning of class.

Guideline for Response 8~Financial Analysis

# Example: Cover Memo Format

TO: Mr./Ms Decision Maker

FROM: Your Name *YN (Write your initials. Do not sign your name)*

DATE: 10/26/10

SUBJECT: BADM 190W~Response #8~Investments

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*(Some type of introductory statement. Example:)*

Thank you for the opportunity to . . . etc. Our report is attached. The following is a summary of the key points:

I. Major issue to be addressed

*(Elaborate. Be specific. Do not make the reader search the report.)*

II. Recommendation

*(Elaborate. Be specific. Do not make the reader search the report.)*

III. Concluding remarks

**Details of report on next 2-3 pages**

Guideline for Response 8~Financial Analysis

**Shisa Wasabi Company**

**Income Statement**

Year ending 12/31/09

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  |  |  | **2009**  (000’s) |  | **2008**  (000’s) |  |  |
|  | **Sales** |  | $30,000 |  | $27,000 |  |  |
|  | Cost of goods sold |  | (17,400) |  | (15,120) |  |  |
|  | **Gross Income** |  | $12,600 |  | $11,880 |  |  |
|  | Operating expenses |  | (8,400) |  | (7,290) |  |  |
|  | **Operating income** |  | $4,200 |  | $4,590 |  |  |
|  | Depreciation |  | (850) |  | (800) |  |  |
|  | **Taxable income** |  | $3,350 |  | $3,790 |  |  |
|  | Taxes |  | (1,240) |  | (1,400) |  |  |
|  | **Net income** |  | $2,110 |  | $2,390 |  |  |

**Balance Sheet**

12/31/09

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  |  |  | **2009**  (000’s) |  | **2008**  (000’s) |  |
|  |  |  | **ASSETS** |  |  |  |
|  | **Current Assets** |  |  |  |  |  |
|  | Cash |  | $400 |  | $500 |  |
|  | Accounts receivable  Inventory |  | 5,000  4,000 |  | 3,400  3,500 |  |
|  | **Total current assets** |  | $9,400 |  | $7,400 |  |
|  | **Fixed assets** |  | 10,000 |  | 9,000 |  |
|  | **Total Assets** |  | **$19,400** |  | **$16,400** |  |
|  | **LIABILITIES & OWNERS' EQUITY** | | | | |  |
|  | **Liabilities**  Notes payable  Accounts payable  **Total Liabilities** |  | $1,000  7,500  $8,500 |  | $800  5,625  $6,425 |  |
|  | **Owners' equity**  (3.5 million shares) |  | 900 |  | 900 |  |
|  | **Retained earnings** |  | 10,000  $10,900 |  | 9,075  $9,975 |  |
|  | **Total Liabilities + OE** |  | **$19,400** |  | **$16,400** |  |

Stock price = $15/share; Dividend = $.25/share

Guideline for Paper 1~Case Analysis

**BADM 190W**

**Guidelines for Case Analysis**

**FORMAT AND GUIDELINES FOR WRITTEN REPORTS FOR CASES**

**The Assignment**

You will obviously read the case. Perhaps you will underline key points and make notes in the margins.

For each written case, prepare an action-oriented advisory report which attempts to present concisely your analysis of the pertinent issues for the company described in the case, identification of the major problem facing its management, and recommendations for a solution. Your report will consist of a cover memo, which summarizes the pertinent points, followed by the report itself.

**The Report Format**

1. **Cover Memo** (1 page, single-spaced, 1" margins, 11 or 12 Pt. Font)

The Cover Memo is to be written from you to the decision maker in the case if such a person is so identified. If not, address it to the Class Instructor. It should provide an overview of the report to follow. The memo should consist of four paragraphs each of which concisely summarizes the corresponding section in your report. You might assume you have been hired by the decision-maker as a consultant to advise them on their company. Memo format is as follows:

**Example: Cover Memo Format**

TO: Mr./Ms Decision Maker

FROM: Your Name YN *(Sign your initials. Do not sign you name)*

DATE: 04/29/XX

SUBJECT: BADM 76W~Paper 1

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*(Some type of introductory statement. Example:)*

Thank you for the opportunity to offer our services to Dollar General Stores. Our report is attached. The following is a summary of the key points:

I. Major Issue to be addressed

*(Elaborate. Be specific. Do not make the reader search the report.)*

II. Recommendation

*(Elaborate. Be specific. Do not make the reader search the report.)*

III. Analysis/Limiting Factors *(Elaborate)*

If you have any questions or require additional information, please let us know.

Guideline for Paper 1~Case Analysis

**B. Report** (main body, 4 page max, single-spaced, 1" margins; see instructions below)

Label each of the four parts of your report with the sub-heading indicated below.

1. **Background:** Identification of Pertinent Issues (Do not regurgitate the case. Do not tell the decision maker things they already know.)

**II.** Identification of **Possible Problems**

**III.** Identification of the **Major Problem**

1. **Recommendations** (Make sure you address/solve the problem)

# Discussion and Analysis

• Reasons or logic behind your recommendation

• Reasons or logic for not recommending other alternatives.

**C. Appendices** (tables and exhibits as appropriate)

**INSTRUCTIONS FOR WRITING THE REPORT**

**Main Body of the Report**

**I. Identification of Pertinent Issues**

Concisely state the significant issues to be resolved in your report. Avoid recounting facts and history (the decision maker/instructor is well aware of these).

**II. Identification of possible problems**

**III. Identification of the Major Problem**

Be sure you have the problem, not symptoms of it. Unless your diagnosis of the problem is correct, all subsequent decision-making will be futile, no matter how efficient it is.

**IV. Recommendations**

Spell out your recommended program of action. Your recommendations should be an outgrowth of imaginative and thorough identification of all the alternatives or possibilities, which might reasonably overcome the obstacles involved in the problem. Base your choice upon a critical evaluation of the "crucial" differences between these alternatives, but give only your preferred alternative here.

Assume you are being paid $1,500 / day plus expenses by the client. If you were paying someone $1,500 a day for advice, and they told you to "I recommend that you be careful. Now, here’s my bill for $20,000." what would you say to them?

Guideline for Paper 1~Case Analysis

**V. Discussion and Analysis of Recommendations**

Present here your conclusions regarding the problem so as to defend your positions, i.e., why you recommended your overall program of action. Include mention of the most significant and relevant facts, assumptions, and principles or other "guides" which led you to decide upon your recommended solution. Do not point-by-point attempt to justify each step.

List next the other alternative courses of action that you seriously considered but rejected. Their inclusion here reassures your reader that you were thorough in your analysis, that you had considered these alternatives.

**VII. Appendices**

In writing your reports, do not include the data or detailed quantitative work in the body; include this in appendices. In the body, reference those appendices, which support your conclusions.

Formulating a Research Question

# **Formulating a Research Question**

**Excerpts from UCSP611 for Faculty! A UMUC Webtycho class**

The basic steps in the research process are:

1. selecting a topic
2. formulating a research question
3. identifying the main ideas and related terms
4. identifying the information you will need and selecting the appropriate research tools
5. locating and retrieving materials
6. determining the relevancy of materials
7. taking notes or highlighting information and organizing it
8. writing the paper

### Selecting a Topic

In academic research, you are often given an assignment or some guidelines to follow when identifying a topic. Some instructors assign a specific topic, or they will ask you to select a topic that interests you. If you are asked to choose your own topic, begin by gathering background information on a topic that interests you. Once you have a topic, you must narrow the focus and formulate a research question that is more focused than a general assignment so that you can reasonably investigate the question and come to a conclusion within the length of the paper assigned.

### Formulating a Research Question

#### What Is a Research Question?

A research question is the main question you propose to answer in your research paper. A specific question that guides the research process, it may change during the course of your research. Occasionally, you can follow your original query through to the final paper without revision. However, it is much more common to find that you must broaden or narrow your topic after conducting preliminary research. Formulating a research question or thesis statement is meant to be a preliminary step. In fact, you may find through your research that you must go in a completely different direction and change your research question altogether.

Formulating a research question may initially seem to be the easiest part of conducting research. However, having a general assignment does not mean that you should skip this step to save time. It may cost you valuable hours if you begin your research without a clear focus.

Formulating a research Question

#### Thesis Statements

You may also be asked to provide a thesis statement. If you reword your research question as a statement, it becomes the basis for the thesis statement. See table 2.1 below for more details on how to turn a topic into a research question or thesis statement.

Table 2.1  
Turning a Topic into a Research Question or Thesis Statement

|  |  |  |  |
| --- | --- | --- | --- |
|  | **General Topic** | **Research Question** | **Thesis Statement** |
| **Definition** | The assignment your faculty member provides or the general area or issue in which you are interested | The question a researcher asks that guides his or her inquiry into a topic | A summary statement of the writer's main point |
| **Example** | Women managers in the workplace | What factors affect female managers' promotional opportunities in upper-level management of Fortune 500 IT companies? | Women managers encounter a glass ceiling in upper-level management of Fortune 500 IT companies. |

#### Narrowing Your Topic

A research question should be neither too broad nor too narrow. If you are starting with a broad topic, it helps to narrow it down until you come up with a workable research question. Table 2.2 provides some examples of ways to narrow a topic.

Table 2.2  
Narrowing Your Topic

|  |  |  |  |
| --- | --- | --- | --- |
| **Broad Topic: Women Managers** | | | |
|  | **Limit by Location** | **Limit by Type of Company** | **Limit by Time Period** |
| **Narrowed Topic** | Women managers in Asia | Women managers in Fortune 500 companies | Women managers in the twentieth century |
| **Further Narrowed Topic** | Women managers in Japan | Women managers in Fortune 500 high-technology companies | Women managers in the 1990s |
| **Research Question** | How is the promotion of women to positions in upper management in IT companies in Japan different from that in the United States? | What factors influence the promotion of women to positions in upper management in Fortune 500 high-technology companies? | How did the Internet change the jobs of women managers in the mid-1990s? |

Note: You know you have a viable research question if, when you enter the key words into the search area, you get good sources.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Sample Grading Rubric for BADM 76W Assignments** | | | | | | |
| **CATEGORY** | **Unacceptable to Marginal (0 - 3.4)** | **Acceptable to Good (3.5 - 4.5)** | **Outstanding (4.5 - 5)** | **Raw Score** | **\*** | **Scaled Score** |
| **Identifies and Summarizes a research question (10%)** | Does not identify and summarize a question, is confused or identifies different or inappropriate questions | Identifies the main question and subsidiary, embedded, or implicit aspects of the question | Identifies not only the basics of the issue, but recognizes nuances of the issue |  | 2 |  |
| **Quality of evidence (25%) (Analysis of Support)** | Merely repeats information provided, taking it as truth or denies evidence without adequate justification | Examines the evidence and source of evidence, questions its accuracy, precision, relevance, and completeness | Observes cause and effect and addresses existing or potential consequences. Clearly distinguishes between fact, opinion, and acknowledges value judgments |  | 5 |  |
| **Conclusions, implications, and consequences (15%)** | Fails to identify conclusions, implications, and consequences of the issue | Identifies and discusses conclusions, implications, and consequences | Objectively reflects upon own assertions |  | 3 |  |
| **Logic & Organization (20%)** | Does not develop ideas cogently; uneven and ineffective overall organization; unfocused introduction or conclusion | Develops unified and coherent ideas within paragraphs with generally adequate transitions; clear overall organization relating most ideas together; good introduction and conclusion. | Develops ideas cogently; organizes them logically with paragraphs and connects them with effective transitions; clear and specific introduction and conclusion |  | 4 |  |
| **Language/Grammar (10%)** | Writing contains frequent spelling and grammar errors which interfere with comprehension | While there may be minor errors, the writing follows normal conventions of spelling and grammar throughout and has been carefully proofread | The writing is essentially error-free in terms of spelling and grammar. |  | 2 |  |
| **Style (10%)** | The purpose and focus of the writing are not clear to the reader | The writer has made good decisions about focus, organization, style, and content so as to achieve the purpose of the writing. | The writer’s decision about focus, organization, style, and content fully elucidate the purpose and keep the purpose at the center of the piece. |  | 2 |  |
| **Peer Review (10%)** | Few and/or unfocused analysis or peer's paper | A fair to good analysis with few concrete suggestions | Good analysis and concrete suggestions to peer |  | 2 |  |

**Endnotes**

1. The College Board, *Writing: Ticket to Work … Or a Ticket Out*, ©2004 [↑](#endnote-ref-1)
2. 2[Michael Crichton](http://www.heartland.org/policybot/byauthor/16365/Michael_Crichton), Published In: Speech at the Commonwealth Club, Publication date: 09/15/2003 [↑](#endnote-ref-2)
3. M. Neil Browne and Stuart M. Keeley, Asking the Right Questions: a Guide to Critical Thinking, Prentice Hall, Upper Saddle river, NJ, 2010, 2 [↑](#endnote-ref-3)
4. http://gwired.gwu.edu/career/ [↑](#endnote-ref-4)
5. Milton Friedman, “The Social Responsibility of a Business is to Increase Its Profits, *The New York Times Magazine,* September 13, 1970 [↑](#endnote-ref-5)
6. Louis E. Boone and David Kurtz, Contemporary Business 2006, Thompson South-Western [↑](#endnote-ref-6)
7. Philip Crosby, Quality is Free: The art of making quality certain. McGraw Hill, New York, 1979 [↑](#endnote-ref-7)
8. Boone & Kurtz, Ibib [↑](#endnote-ref-8)