

The Design and Delivery of Goods and Services

BUSA 365

Student Participant Guide
13th Edition

prepared by

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Fall 2007

| <p style="text-align: center;">The Design & Delivery of Goods & Services BUSA 365 Fall 2007 Six Credit Course, GU 100 Section-M01 TTh 1:00-3:50 Section-M02 TTh 6:00-8:45</p> | | | | | |
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| Professor | Department | Office | Phone | e-mail | Office Hrs Below & by Appointment |
| Minjoon Jun, Ph.D. | Management | GU 317 | 646-4987 | minjun@nmsu.edu | Tu 9:30-10:30 a.m. W 9:30-10:30 a.m. |
| Pookie Sautter, Ph.D. | Marketing | GU 410 | 646-6027 | esautter@nmsu.edu | Tu Noon – 1:00 p.m. Th Noon – 1:00 p.m. |
| Sherry Mills , Ph.D. | Accounting | BC 335 | 646-5681 | smills@nmsu.edu | M 10:30 a.m. – 11:30 a.m. W 10:30 a.m. - 11:30 a.m. |
| WebCT | Upon registering for this course you will be enrolled in the WebCT Page for this course. You may access it via the Internet at my.nmsu.edu . You will be expected to visit this site regularly and use it as one of the key tools for this course. | | | | |
| Text (Required) | <ul style="list-style-type: none"> • <u>Student Participant Guide and Readings</u>. Purchase at Business Complex Computer Laboratory, BC 309 Help Desk. This is a CASH ONLY purchase in the lab, NO credit/debit cards or checks. • Minimum of 4 Scantron Form 882-E. | | | | |
| Capabilities | Computer skills and computer access to Internet and e-mail account. | | | | |
| Course Description | Integration of managerial accounting, operations management, and marketing functions. Design, implementation, and operation of systems to create and deliver goods and services. | | | | |
| Prerequisites | ACCT 251, ACCT 252, BUSA 111, MATH 142G, and MATH 230 or MATH 185 – All must have been successfully passed and completed in prior semesters. Past completion or concurrent enrollment is acceptable for ECON 251, ECON 252, EST 251 . | | | | |
| Objectives | This junior core course builds on BUSA 111 to address the integrated tasks involved in the design and delivery of a product/service in a competitive market. The purpose is to develop the general business skills you will need to complete an integrated business project for the introduction of a new product/service and operation of the required systems. In this course you will learn about the interrelationships among marketing, operations, and accounting activities. Students will also demonstrate the ability to present material effectively in written presentations. | | | | |
| Outcomes | At the completion of the course, the student should be able to: <ul style="list-style-type: none"> • Demonstrate the use of marketing concepts in business, • Demonstrate the use of operations management concepts in business, • Demonstrate the use of management accounting concepts in business, • Address business problems in a logical and analytical manner. • Work more effectively in teams. | | | | |

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|---------|-----------------------------------------|-------------|---------------------------------------------------------------------------------------|
| Grading | Participation | 10 % | Grading Break Points: A 90% + B 80%-89% C 70%-79% D 60%-69% F <60% |
| | Exam 1 | 15 % | |
| | Exam 2 | 15 % | |
| | Exam 3 | 15 % | |
| | Cumulative Final | 20 % | |
| | Group Project (Stg 1-10%, Stg 2-15%) | 25% | |
| | <u>Total</u> | <u>100%</u> | |

| General University / College Policies | |
|---------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Students with Disabilities: | <p>If you have or believe you have a disability and would benefit from any accommodations, you may wish to self-identify by contacting the Services for Students with Disabilities (SSD) Office located in Garcia Annex (phone: 646-6840). If you have already registered, please make sure that your instructor receives a copy of the accommodation memorandum from SSD within the first two weeks of classes. It is your responsibility to inform either your instructor or SSD representative in a timely manner if services/accommodations provided are not meeting your needs.</p> <p>If you have a condition which may affect your ability to exit safely from the premises in an emergency or which may cause an emergency during class, you are encouraged to discuss any concerns with the instructor and/or Michael Armendariz, SSD Coordinator. Feel free to call Mr. Gerard Nevarez, Director of Institutional Equity and EEO/ADA Office at 646-3635 with any questions about the Americans with Disabilities Act (ADA) and/or Section 504 of the Rehabilitation Act of 1973. All medical information will be treated confidentially.</p> |
| Withdrawal Policies | The last day to drop and receive a "W" is 10/16/2007 . |
| Incomplete Grades | Under university policy, incompletes may be given only if a student has a passing grade at mid-semester (the last day to withdraw from class) and is precluded from successful completion of the second half of the course by a documented illness, documented death, family crisis or other similar circumstances beyond the student's control. Note: Doing poorly or work conflicts do NOT constitute justification for an "I" in a course. |
| Course Schedule | We reserve the right to change classroom policies or assignments if circumstances dictate. Any changes will be announced in class and /or via e-mail on the course WebCT HomePage and it is your responsibility to be aware of them. |
| Picture/Video Policy | Digital team pictures are used solely to aid the instructors to be able to identify students in the class. Instructors may retain file hard copies for future reference and recommendation purposes. Any images will not be published or viewed publicly without expressed consent of the students. Any students having concerns about this policy should discuss it with the instructors. |

BUSA 365 Design and Delivery Policies

I. Graded Course Components

A. General Policies for Student Work

Student conduct and classroom etiquette

1. All work must be completed independently and without help or consultation of others, unless explicitly stated otherwise by the instructor(s).
2. All cell phones must be turned off in class unless prior approval is granted by the instructor. Unapproved usage will be considered disruptive to the class.
3. If a student disrupts the learning process for other members of the class, the instructor(s) reserves the right to dismiss that student from the classroom.
4. Laptops and PDAs can be used for note taking in this class, unless usage becomes disruptive to other members of the class.

Grading Errors and/or Omissions

Students must take personal responsibility for checking posted grades in a timely fashion. If you detect an omission or believe there is an error in the posted grade, you must send a WebCT e-mail to the instructor in charge of the graded material **WITHIN TWO WEEKS OF THE GRADE POSTING**. Use the following guidelines for the e-mail.

1. Put the Words **GRADE REVIEW** in the subject heading.
2. Identify the assignment, quiz or exam you wish reviewed.
3. Attach copies of the work in question if they are in your possession.
4. Indicate what your concern is and what remedy you are seeking.

You must receive an e-mail confirmation about the grade change from the instructor before you can assume that the matter is settled.

Academic Dishonesty

In today's business environment, it has become increasingly important to instill the importance of honesty and integrity in the study and practice of business. Accordingly, the instructional team maintains a **zero-tolerance policy** for instances of academic fraud or dishonesty. Following are examples of such fraud:

- falsifying data and/or sources of data used in reports
- making up data
- using any device during class to assist during exam periods unless expressly pre-approved by the instructional team
- representing any form of work done by others as your own
- paraphrasing other's work without giving credit to the original author
- lying to instructors or your colleagues about your work in this class

The previous list is not intended to be exhaustive but should provide an indication that any intentional misrepresentation/falsification of information produced, reported or disseminated as part of the requirements of this class will be penalized to the fullest extent possible; in most cases, this means the instructional team will pursue a course of action which will remove you from the class and result in your failure of the course. If you have ANY questions about this policy, or potentially question whether or not an act might be in conflict with this policy, contact a member of the instructional team immediately.

B. Participation

Participation accounts for 10% of the grade in this course. Total earned points for participation will be 100 points. Five points (5) will be earned based on participation in review sessions after exams 1 and 2 (total of 10 points). The remaining points are equally distributed to the three instructors (30 points each). Each instructor will calculate his/her participation points based on various activities which might include attendance taking, completion of in or out of class assignments, etc. Each instructor will clarify those policies when he/she conducts class.

Classes will begin and end promptly according to the published class schedule times. We expect students to come on time, prepared to learn.

If situations exist which require students to arrive late or leave early, it is the student's obligation to inform the instructors of the circumstances of the situation. As faculty we will try to accommodate these situations to the best of our ability. If late arrival to class is due to other faculty regularly keeping you beyond the scheduled class times, please report this to your instructor.

Class Absence

Participation is a graded component of this class, thus attendance is required. Per the university guidelines: "Students making satisfactory progress in their classes will be excused from classes when they are representing New Mexico State University on a university sponsored event (e.g., ASNMSU President represents NMSU at legislative session, student-athletes competing in NMSU scheduled athletic events or education field trips and conferences). Authorized absences do not relieve the student of class responsibilities. Prior written notice of the authorized absence will be provided to the instructor by the sponsoring department." If you believe you have a valid reason for missing a class and/or assigned work (e.g., university excused absence), you must send an e-mail using the following guidelines.

1. The e-mail must be sent at least **ONE WEEK PRIOR** to the date to be missed. If the absence/missed assignment was due to unforeseen circumstances, you must submit an e-mail to the instructor **as soon as you can reasonably access the e-mail system**.
2. In the WebCT e-mail, identify the date(s) and/or assignments missed and how you propose to meet your responsibilities for class material and your team responsibilities.
3. The e-mail must be sent to the instructor in charge of the material missed, and the subject line of the e-mail must specifically state **Absence Notification/Make-Up Request and the name of the instructor in charge of the class and material. For example, Attn: Mills, Budget make-up request.**
4. Close your email with your **full name, section number, and team number**.
5. You must receive an e-mail confirmation from the instructor before you can assume that the matter is settled. Save the e-mail as record of your agreement with the instructor.

C. Exams

1. Regular Class Examination Periods: Three examination periods will be conducted during the regularly scheduled class meeting schedule.

2. Exam review sessions. The class session following each exam will provide time for peer review of exams. Students must be in attendance in order to pick up the returned exam. Students are encouraged to use these as one part of your preparation for the cumulative final in this course.
3. Cumulative Final Exam during Finals Week: A cumulative final will be given during the final exam period scheduled for each class section. Additional information pertaining to the content and structure of the exam will be given in class towards the end of the regularly scheduled semester.
4. Scantron Form 882-E will be required for each testing period.
5. During the testing periods, students are not allowed to have ANY materials or devices accessible, other than a scantron and/or a calculator (as instructed by the professor). Calculators must be stand alone devices; cell phones, PDA's or other communication devices cannot be used at any time during the examination period. Students accessing any paper, devices, or other materials during the test period without EXPLICIT PERMISSION OF THE INSTRUCTORS will be suspected of academic fraud and will be dealt with accordingly.

D. Semester Group Project

1. **Grading.** Team members participating on a stage of the team project will receive the team grade for that stage, adjusted for results of the individual completion or partial completion of peer evaluations. Details on the peer evaluations will be provided during class.
2. **Team Contribution Management.** Periodically each student will rate each of his/her team members using a peer evaluation form (to be posted on the WebCT site). This information will be used as the primary input to individual performance reviews by the course instructors. This review can result in the firing of an individual team member.
3. **Consequences of Being Fired from Your Team.** Learning from team-based activities is an important component of this course. An individual who repeatedly fails to actively participate as a team member and /or fails to fulfill his/her obligations to a team is not successfully meeting the requirements of the class. Accordingly, if an individual is fired from a team (based on team ratings and a formal review by the instructors), the individual will face the following consequences:
 - If students are fired from their team after stage 1, the distribution of graded components will be 20% for each exam, 10% for participation and 30% for the cumulative final. If a team member is fired after stage 2 completion, the distribution of graded components will be 15% for exams 1 and 2, 20% for exam 3, 10% for participation, 10% for stage 1, 30% on cumulative final. As in the past, firing from a team exempts a person from getting an A in the course. The individual cannot be awarded an A in the course given the failure to effectively participate in the team learning components of the course.

II. Uses of WebCT

- A. The primary use of the Bulletin Board (**Download Excel,Ppt,etc.** topic area) is for distribution of materials by the faculty, e.g. spreadsheets and documents. Students are welcome to post questions or answers to questions (use the **Main** area), but these will be deleted periodically to maintain focus on course materials. Remember this is a public forum viewed by the entire class; be professional and respectful of your audience.

- B.** We expect course related e-mail to be done **using WebCT Mail**. Remember that e-mail to "Instructor" may be viewed by all three instructors so **always include a particular instructor's name in the beginning of the subject line**; this is the only way to insure prompt response to your emails, e.g. Attn: Dr. Mills-Stage 2 budget.
- C.** You **MUST** use WebCT communication tools to document communication with your team members. Using email and bulletin boards in WebCT reduces incompatible e-mail processors and the need to check multiple mail boxes for class messages. **Bulletin areas** will be setup for each team to post their project related documents and to create evidence of clear communication among team members.

Topic Schedule Design & Delivery of Goods & Services

| Module | Dates | Topics |
|------------|-------------|----------------------------------------------------------------------------------------------------------------------------|
| M1 | Th Aug.23 | (All) Overview of Course & Project |
| M2A M2B | T Aug.28 | (Jun) Business Strategy (Jun) Operations Strategy |
| M3 | Th Aug.30 | (Sautter) Marketing Strategy: Segmenting, Targeting & Positioning Last day to add classes is Friday, August 31. |
| M4A M4B | T Sept.4 | (Jun) Translating the Voice of the Customer--House of Quality (Jun) Project Management |
| | Th Sept.6 | (All) Setup Team Structure and Team Pictures Team workshop <u>Last day to drop the class is Friday, September 7.</u> |
| M5A M5B | T Sept.11 | (Sautter) Market Research (Jun) Product Design & Process |
| M6 | Th Sept.13 | (Jun) Service Design & Service Delivery Process |
| M7 | T Sept.18 | (Mills) Total Quality Management , Quality Costs and Process Value Analysis |
| | Th Sept.20 | Exam 1 |
| | T Sept.25 | Test Review & Project Work Day |
| M8 | Th Sept. 27 | (Sautter) Marketing Mix Elements: Product & Price Management |
| M9 | T Oct.2 | (Mills) Cost-Volume-Profit (CVP) Analysis and Sensitivity Analysis |

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| M10 | Th Oct.4 | (Sautter) Marketing Mix Element: Promotion <u>Peer Evaluations due</u> |
| M11 | T Oct. 9 | (Mills) Budgeting |
| M12 | Th Oct. 11 | (Jun) Facility Layout and Location |
| M13 | T Oct.16 | (Sautter) Marketing Mix Element: Place & Supply Chain Mgt. Last day to withdraw from a course. |
| M14A M14B | Th Oct. 18 | (Jun) Purchasing/Supplier Partnerships for Effective Supply Chains (Jun) Human Resource Issues |
| M15 | T Oct.23 | (Mills) Outsourcing |
| | Th Oct.25 | Exam 2 |
| | T Oct.30 | Test Review & Project Work Day |
| M16 | Th Nov.1 | (Jun) Production Planning |
| Stage 1 due Friday, November 2 by noon To be turned into the Management department office secretary, BC 220 | | |
| M17 | T Nov. 6 | (Jun) JIT and E-manufacturing <u>Peer Evaluations due</u> |
| M18 | Th Nov. 8 | (Mills) Activity Based Costing: Product Profitability |
| M19 | T Nov. 13 | (Mills) ABC – Customer Profitability (All) Return projects, Q & A |
| M20 | Th Nov. 15 | (Sautter) Special Topics |
| M21 | T Nov. 27 | (Sautter & Mills) Ethics & Fraud in Business |
| M22 | Th Nov. 29 | (Sautter & Mills) Ethics & Fraud in Business |
| Stage 2 due Friday by noon, November 30 To be turned into the Management department office secretary, BC 220 | | |
| | T Dec. 4 | Exam 3 <u>Peer Evaluations due</u> |
| | Th Dec. 6 | Final Review |
| Final Cumulative Exam | | Sec. 1 Tuesday, Dec. 11, 1:00-3:00 p.m. Sec. 2 Tuesday, Dec. 11, 6:00-8:00 p.m. |

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| <p style="text-align: center;">BUSA 365 – Design and Delivery of Goods and Services Fall 2007</p> |
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Overall Team Project Learning Objectives

1. To apply concepts presented in BUSA 365 to a service/retail operation
2. To develop business, marketing and operations strategies
3. To develop team/group skills
4. To improve understanding of integration of business functions

The project in this class requires student teams to select a restaurant from a list of five restaurants.

MIX – Pacific Rim Cuisine, 1001 E. University Ave. D-4
The Shed – Old Mesilla Pastry Café 810 S. Valley Drive
Hiebert’s Fine Foods – Mexican and Steak Fingers 525 E. Madrid Ave.
Delicias Del Mar – Seafood Mexican 1401 El Paseo
Ranchway BBQ and Mexican 604 N. Valley Drive

Teams will be asked to design specific value added changes to the restaurant’s operations and marketing strategies and/or activities. The project will focus on a detailed explanation of the changes, and the effects of these changes on marketing, operations and accounting functions.

Teams will submit two stages for the project. The first stage (10% of course grade) must contain all required content for the project. The second stage (15% of course grade) provides an opportunity for each team to revise the project to improve overall performance and/or grade. Your team may be satisfied with your Stage 1 grade and so may choose not to revise Stage 1 based on faculty comments. We will assign your Stage 1 team score to your Stage 2 in this case. Otherwise, you will revise and resubmit your work in Stage 2 and faculty will assign a new score for Stage 2.

Due dates for each stage:

Stage 1 is due at noon on Friday, November 2, 2007. Stage 2 is due at noon on Friday, November 30, 2007. By that time, the electronic files must be posted to your team’s presentation area, and the hard copy must be delivered to the secretary in the Management department, located on second floor of Business Complex building.

Team Project Requirements

Title Page – includes name of the restaurant, course, section, team number, team member names, and due date (all centered).

I. Executive Summary (25 points)

Begin your report with a one-page executive summary. This single spaced, one page should summarize the key points of your report including a summary of the current

business strategy, concise descriptions of the primary and secondary target markets, proposed changes to operations and marketing strategies, and a summary of the financial implications of the proposed changes. The executive summary information must match information presented in the body of the report.

II. Business Description (20 points)

- a) Briefly introduce the reader to your team's restaurant (name, history, location, size, key competitors, etc.).
- b) Identify and characterize the restaurant's existing business strategy in terms of four types of business strategies, such as cost leadership, differentiation, cost leadership/focus, and differentiation/focus.

III. Target Market (30 points)

- a) Present a clear, concise statement of the primary target market for your restaurant. Follow with a clear concise statement of the secondary target market selected as the focus for the changes made to your business. Each market description must include at least three different bases of segmentation (i.e., geographic, demographic, psychographic, behavioral) and at least four different descriptive variables (e.g., income, gender, mileage radius, interests, usage rates, etc.).
- b) Explain why the particular secondary market was selected; be sure to specifically mention all criteria used for effective segmentation in your explanation (e.g., measurability, differential responsiveness, etc.). Your explanation should also discuss why you believe you can design specific changes to the marketing mix for the secondary market in such a way that will not negatively affect customer satisfaction for the primary target market.

IV. Service Design and Service Delivery Process

Part 1. Service Blueprint and Facility Layout Chart (50 points)

- a) Drawing "AS IS" Service Blueprint
 - 1) Develop a blueprint for the current service delivery process (from customers' entry into the restaurant to customers' exit from the restaurant) employed by the restaurant. Briefly describe the current service delivery process based on the service blueprint constructed.
 - 2) Specifically list steps or tasks currently performed in producing and delivering products/services to customers as shown in the service blueprint, as well as the estimated time and labor cost per hour to perform each step. Prepare an activity cost table (see Module 7, pages M7.5-M7.11 for guidance).
- b) Drawing "AS IS" Facility Layout Chart
 - 1) Present a proportionally sized facility layout chart with specified dimensions (e.g., 40 feet by 60 feet) for the restaurant.
 - 2) Include accurate table numbers/icons in your facility layout diagram. You can simply insert circles or squares for the table, and indicate within the circle/square

the seating capacity for each table. This must match seating capacity figures used in your sales forecast worksheets.

c) Developing “SHOULD BE” Service Blueprint

- 1) Identify non-value added activities in the current service delivery process.
- 2) Provide a detailed discussion on what changes in the current service delivery process you would suggest to add value and develop the “should be” service blueprint accordingly.
- 3) Prepare an activity cost table (see Module 7, pages M7.5-M7.11 for guidance). In addition, calculate the change in the lead-time efficiency ratio and the value added cost as a percentage of total cost as a result of the changes shown in the “should be” service blueprint.

d) Developing “SHOULD BE” Facility Layout Chart

- 1) Identify key drawbacks of the current facility layout.
- 2) Provide a detailed discussion on what changes in the facility layout you would suggest to add value and develop the “should be” facility layout chart accordingly.

Part 2. Financial impact of operating decisions on financial budgets (20 points)

Prepare two separate detailed listings (one for the service blueprint and one for the facility layout) of all of the physical, human, and capital resources needed, as well as the sales revenue increase that will result from the decision. Include the \$ amounts supported by detailed calculations). Sources for your information must be included as footnotes to the table (i.e., contact person’s name, title and phone number) and/or copies of specific information sheets must be provided as an appendix to the report. Note that each item listed becomes an accounting transaction involving a change in two accounts. The illustration in Module 11, pages M11.12-M11.13 will provide guidance.

V. Promotion Activity

Part 1. Advertisement and Special Event (50 points)

a) Advertisement: Description of the tactic

- Select from the following advertising options: magazine ad, direct mail, newspaper insert, television ad or radio ad. Any other form of advertisement must receive prior approval from Dr. Sautter.
- Explain 1-2 sentences, what you are trying to accomplish with your promotional activity (e.g., **Inform** the target about the new design of the restaurant interior; **Persuade** audience that the new pricing options offer greater value than competitive restaurants in the area; **Remind** families about the speed of service and low cost menu items.) Explain why the particular ad type was chosen and how it meets the intended promotion objectives.
- Fully explain the details of the creative strategy, design and content of the ad. (e.g., radio scripts, visual ad mock-ups, etc.). Explain who will execute the ad (design) (e.g., paid actors, paid graphic designers, etc.).
- Clearly detail the schedule and frequency of the ad (e.g., time of year/month/day).

- Explain how the timing matches the media patterns of the target market.
- Provide specific details about the selected media vehicle (e.g. specific station/newspaper/web ad agency), and why the vehicle is most appropriate for reaching your target market. Sources for your information must be included (i.e., contact person's name, title and phone number and/or copies of specific information sheets provided as an appendix to the report).
- Explain the effect of your special event on capacity management in your operations. Be sure you clarify how capacity will be affected over time.

b) Special event: Description of special event

- Explain 1-2 sentences, what you are trying to accomplish with your special event (e.g., **Inform** the target about the new design of the restaurant interior; **Persuade** target that the new pricing options offer greater value than competitive restaurants in the area; **Remind** families about the speed of service and low cost menu items.) Explain why the particular special event meets the intended promotion objectives.
- Provide a description of what will occur at the special event and explain why the event will have specific and unique appeal to your secondary target market.
- Explain when the event will be held (e.g., time of year/month/day) and the total time duration for the event?
- Identify where will the event be held and the maximum capacity constraints for the event?
- Explain specific resource requirements (physical and human) for execution of the event.
- Write a press release for the event. Include a list of specific media vehicles which will be sent the press release.
- Explain the effect of your special event on capacity management in your operations. Be sure you clarify how capacity will be affected over time.

Part 2. Financial impact of marketing decisions on financial budgets (20 points)

Prepare two separate detailed listings (one for advertisement and one for special event) of all of the physical, human, and capital resources needed, as well as the sales revenue increase that will result from the decision. Include the \$ amounts supported by detailed calculations). Sources for your information must be included as footnotes to the table (i.e., contact person's name, title and phone number) and/or copies of specific information sheets must be provided as an appendix to the report. Note that each item listed becomes an accounting transaction involving a change in two accounts. The illustration in Module 11, pages M11.12-M11.13 will provide guidance.

VI. Sensitivity Analysis (35 points)

Preparation:

- Refer to Module 11, pages M11.12 through M11.16 to guide your team.
- Modify the Excel worksheet called "Ricos Restaurant" to fit your restaurant's situation for the year ending December 31, 2008 only. Save your restaurant's Excel worksheet using the file name, "SecXXTmYY_Sensitivity Analysis_Stage

1_Fa07” for the first stage and the file name, “SecXXTmYY_Sensitivity Analysis_Stage 2_Fa07” for the second stage.

- a) Analyze accounting transactions using the accounting equation (Step 2 in Module 11 page M11.12). Each column represents an account on the balance sheet. The rows reflect the accounting transactions for each resource used (expense) and received (revenue) as presented in Step 1. We will assume that your restaurant pays cash at the time food is purchased or employees work and when other cash-related expenses are incurred. Since we are only interested in the incremental change from these decisions, we will not include the beginning and ending balances of the balance sheet accounts. Prepare the analysis in your Excel file. Insert the results of this analysis in the team’s Word document.
- b) Prepare a sensitivity analysis showing the change in revenue, expenses, and net income for the combined changes in operations and marketing (Step 3 in Module 11, page M11.12). Use the Excel spreadsheet to reflect your team’s financial decisions. Complete and link the supporting worksheets to the financial statement worksheets in your Excel file. Insert the budgeted income statement only into the team’s Word document. (I will refer to Excel spreadsheet to review details in the supporting schedules).
- c) Prepare a summary of the impact the changes in operations and marketing will have on the balance sheet accounts (Step 4 in Module 11, page M11.12). Complete and link the worksheets in your Excel file. Insert the budgeted balance sheet only into the team’s Word document. (I will refer to Excel spreadsheet to review details in the supporting schedules).
- d) Assume you have been asked to make a brief, oral presentation of the financial impact of your team’s decisions. Prepare the script that tells the story. You must tie in the financial information to the specific decisions made rather than just stating the \$ amount of change for a particular financial statement account. Your script should be ten sentences or less.

VII. Overall Performance (200 points)

Each project submission will also receive scores on two additional graded components: **competitive advantage** (i.e., feasibility, creativity, depth of analysis), and **professionalism** (i.e., spelling, grammar, team coordination, formatting requirements, deadline adherence,).

WRITING TIPS

As you prepare your project submissions, remember the importance of effective written communication. Please keep the following in mind as you complete your submissions.

- The paper reads well as a single coherent document. The writers have made good decisions about focus, organization, style/tone, and content to communicate clearly and effectively.
- Appropriate conventions for style and form are used consistently throughout. Sources documented thoroughly and competently.
- Sentences are structured and words are chosen to communicate ideas clearly. Sequencing of ideas within paragraphs and transitions between paragraphs make the writers' points easy to follow.

Formatting requirements for Project

1. Document/Spreadsheet submission requirements.

- a) **Word File Submissions:** Stages 1 and 2 must be prepared as Word documents; both hard and electronic copies must be submitted. The hard copy must be submitted to the Management Department's secretary on second floor of Business Complex building. Name your team's electronic copy as "SecXX_TeamYY_Project_StageX_Fa07.doc". Insert the appropriate stage number, team number, and section number to replace x's in the file name (e.g., Sec01_Team03_Project_Stage1_Fa07.doc). Stage 1 and 2 also require uploading your Excel file to support the income statement and sensitivity analysis requirements.
- b) **Excel File:** Submit the original Excel file from Stage 1 and the revised Excel file from Stage 2 (both of which must include financial budgets and all supporting worksheets) to your team's presentation area when you post the Word document. Save the revised file as "SecXXTmYY_Sensitivity Analysis_Stage 1_Fa07" for the first stage and the file name, "SecXXTmYY_Sensitivity Analysis_Stage 2_Fa07" for the second stage.

2. All figures, tables, drawings, etc. must be incorporated into a single Word document file and must be specifically labeled and also referenced within the body of the paper.

3. The word document and Excel file must also be posted as an attachment to a message in the **team's bulletin board/discussion** area with the subject line titled "Stagex_SecXX_TeamYY_Fa07". The document and Excel file must be posted to your team's area by the beginning of class on the due date of each stage. This allows your teammates (and faculty) to find your project and if desired to obtain a copy with a single download.

4. Format Guidelines

- a) Use Times New Roman, 12 point font, double spaced, standard margins (1.25" left and right, 1" top and bottom).
- b) No covers/binders on hard copy. Staple in top left hand corner.
- c) Include any reference citations as footnotes in your paper. Use an approved formatting style. Two quick references for correct formatting are linked on the NMSU library web page

<http://lib.nmsu.edu/instruction/handouts/APAtipsheet.pdf> and
<http://webster.commnet.edu/apa/index.htm> .

5. Primary contributors must be indicated by including team members' names in parentheses to the right of section headings in each stage. It is important that each team member make a contribution to each stage and that an effort is made to balance the work load across the team and over the duration of the semester. Members who do not carry their fair share face the risk of being fired due to team evaluations and lack of visible contribution to the project.

6. If your team chooses to revise Stage 1 work and resubmit based on instructor comments, then specifically highlight, in yellow, text and/or tables that have been revised since stage 1. If your team chooses not to revise Stage 1, then the team score for Stage 1 will also be assigned to Stage 2.

INDIVIDUAL REQUIREMENTS

Peer Evaluations Requirements Each team member will **submit separately to the faculty** a peer evaluation related to team activities occurring in each stage. The peer evaluation is to be done individually and privately. Turn in your peer evaluation at the beginning of class meetings on the dates specified in the schedule. You will receive a 5 point deduction on your subsequent individual project stage score for failure to submit each and every required peer evaluation.

BUSA 365 – Design and Delivery of Goods and Services – Spring 2007

Submitting Member _____ Section ____ Team ____ Date _____

In alphabetic order (left to right), enter all team members' names including in your own. Complete ratings for all team members, including you.

| | | | | | | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------|--------|--------|--------|--------|--------|--------|
| Rate each team member on the following criteria: 1-Abysmal 2- Poor 3-Average 4- Good 5- Outstanding | Name: | Name | Name: | Name: | Name: | Name: |
| Quality of work (1-5) | | | | | | |
| Reliability (met deadlines, fulfilled obligations) (1-5) | | | | | | |
| Responsiveness to team requests, communications (1-5) | | | | | | |
| Attitude toward task and team members (1-5) | | | | | | |
| Circle Overall Rating (S or U) | S U | S U | S U | S U | S U | S U |

On the back of this page, justify any rating of Unsatisfactory (U) that you have given for this evaluation.

BUSA 365 – Design and Delivery of Goods and Services – Spring 2007

Submitting Member _____ Section ____ Team ____ Date _____

In alphabetic order (left to right), enter all team members' names including in your own. Complete ratings for all team members, including you.

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| Reliability (met deadlines, fulfilled obligations) (1-5) | | | | | | |
| Responsiveness to team requests, communications (1-5) | | | | | | |
| Attitude toward task and team members (1-5) | | | | | | |
| Circle Overall Rating (S or U) | S U | S U | S U | S U | S U | S U |

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BUSA 365 – Design and Delivery of Goods and Services – Spring 2007

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| Quality of work (1-5) | | | | | | |
| Reliability (met deadlines, fulfilled obligations) (1-5) | | | | | | |
| Responsiveness to team requests, communications (1-5) | | | | | | |
| Attitude toward task and team members (1-5) | | | | | | |
| Circle Overall Rating (S or U) | S U | S U | S U | S U | S U | S U |

On the back of this page, justify any rating of Unsatisfactory (U) that you have given for this evaluation.