The Format

* This report must be presented in full business case study report format.
* All solutions must be provided in full text.
* Do not list your points.
* Reference all material and/or information that is not your own (please review the [Plagiarism Policy](http://www.citt.ca/moodle2.9/mod/page/view.php?id=425) tab on the course site)
* The final report should be double spaced, in 12 point Times New Roman font.
* Provide a blank page at the beginning of the report that contains your name, the report title and the date. Please do not include pictures on this page.
* As a guideline, your report should be approximately 2500 words (roughly 8-10 pages long excluding appendices and Executive Summary). The Executive Summary portion should be 1 or 2 pages long.
* **Your report must be saved in MS Word.  If using spreadsheets these should be in  MS Excel**

Immediately after the Title Page there should be:

* Executive Summary,
* Table of Contents,
* Introduction to the Report,
* Report Body/Text; and
* Summary and Conclusions.

The report should be developed with the following format in mind:

* Executive Summary - The Executive Summary must be to the point; convincing; clearly identify what action or policies are to be established; and most of all must give the reader everything they need to know to understand your recommendation(s) without feeling the need to necessarily read the body of the report. Any figures cited must be stated in the summary (as a chart or table), or must be referenced to a chart or table that may lie in the appendix portion of your submission. Remember, this part of the study is written for an executive who does not have much time and wants only to know that you have done your homework. They do not need to understand what homework, or how you conducted your research from reading this part of the report. Remember to write this as if the marker was your senior executive. (See How to Prepare an Executive Summary section below).
* Table of Contents - This should clearly identify the key portions of the report and their page numbers. Give some detail and select appropriate sections of your report that will assist the reader in finding information. Avoid "Report Body" as one complete section. Detail your Appendices should you include them.
* Introduction - In the introduction the author brings all the readers to the same point of departure before beginning the main body or text of the report. It is appropriate to redefine the criteria in your own words. For example, you may wish to review the reasons for the report, the scope and limitations, and your methods for collecting the data that you will present in the report.
* Report Body or Text - This is the portion of the report, in which the information is presented, the problems identified, the solutions suggested, and the battles won and lost. If, at the outset of the investigation or analysis, you determined the scope and limitations, and had a good idea of how the report should be organized - then worked your plan, chances are good that your report will be informative, persuasive, and effective. Give some thought as to how you will present/reference data/findings. Ensure that any data presented is clearly mentioned or referenced in the report body if you choose to put in an appendix. Diagrams/charts/tables not properly referenced in the report body will not be considered part of the report and style marks will be lost should this take place.
* Summary and Conclusions - Here you should briefly summarize the important data developed in the body or text and advance the conclusions reached (i.e. advance whatever recommendations/actions you propose, based on your study).

Report Writing Style   
Good report writing is one of the most useful skills you can acquire. If your report is well written, clear and concise, it will create a good impression on the reader; if it is inaccurate, confused, or does not follow the required format, it will reveal symptoms of muddled thinking.

You will achieve high marks for effective presentation, organization and originality of thought, however, you must support your recommendations with sound business decisions. When reading your report, the marker will be determining whether your theories are communicated effectively.

What is also important is how you present them. You will lose marks for not following the instructions on format, untidy presentation, misspelled words, poor word choices, poor grammar, or an executive summary that leaves the marker no alternative but to have to read the whole report to understand the recommendations you have made and why.

The marker will be looking for how your originality of thought has been applied to the questions at hand in the [Business Case Study Question](http://www.citt.ca/moodle2.9/mod/page/view.php?id=789). Most marks are lost (in the report body) because candidates fail to answer the questions at hand.

Assumptions   
In all likelihood, your Business Case Study Report submission will contain some assumptions. Some of these assumptions (good ones) are developed from basic facts found in the [Business Case Study Question](http://www.citt.ca/moodle2.9/mod/page/view.php?id=789). Other assumptions are developed from generalized, vague points of note that cannot be substantiated, and can place the Business Case Study Report's validity at peril. Clearly state your assumptions, with reasons.

It is critical that candidates not make assumptions on information that is not in the [Business Case Study Question](http://www.citt.ca/moodle2.9/mod/page/view.php?id=789). All information needed to complete the Business Case Study Report is provided.

Avoid the terms "further research and analysis is required"; and never state that there is not enough information to complete the case. Ask yourself, "If this report were real, with a real deadline, would you tell your president that it could not be completed without further research?"

General assumptions are not a good way to reduce the workload in a Business Case Study Report. Citing general assumptions, which cannot be substantiated, are a good way to lose marks.

While it is important to consider the various points within "report writing style", the major concerns we want you to address can best be considered based on the following points:

* if you were the recipient of the report, what would be your first impression?
* after you have read the executive summary do you have a grasp of the content and the action being recommended?
* if there is a single point on which you require a little more information, could you find it easily using the table of contents and if so was the point clear within the body of the report
* is the executive summary different from the conclusion, summary portion of the report?

If you are pleased with the responses you give yourself to these four points, then you should receive a good grade for the executive summary and content. If you must refer to the body of the report more than once after reading the executive summary, then your mark will likely reflect this. One of the outcomes of this exercise is to help you develop good writing/communication skills when making presentations to your organization's executives.

How to Prepare an Executive Summary

An Executive Summary is a one or two-page version of your Business Case Study Report. It is structured the same way, containing an introduction, body and a conclusion. It is not an introduction of the Formal Report.

The Introduction of the Executive Summary should precisely identify the challenges, issues or problems you are examining. There should be no doubt in the reader's mind as to what these are, after reading the introduction.

The Body of the Executive Summary is meant to illustrate the scope of your analysis. It should contain alternative solutions to the challenges, issues or problems you introduced in the first paragraph. Data can be used in summary form to indicate the strengths and weaknesses of the various alternatives you are presenting. If you are using a table then tell us about the data don't say "see above" "see below", "see attached". Discuss the importance/significance of the data you are presenting, particularly if it is in support of your findings/recommendations.

The Conclusion should explicitly state your recommendations based on the alternatives discussed in the Introduction and Body. It should be supported with data that is brief and to the point and represents the end result of your analysis (i.e.: the bottom line).

The Executive Summary is meant to accompany the fuller presentation. It is written in clear and direct language, giving an overview of the report/proposal without having to read through the entire report from cover to cover.

The audience for an executive summary includes senior-level executives, directors, board members, and others who need to know something about your report/proposal but who do not have the time or interest in the level of detail included in the full version.

The executive summary should not include a discussion of the difficulties you encountered, nor your reasons for selecting a particular topic or approach, nor other peripheral information. It must show that you have a complete understanding of your business ideas/recommendations/actions.

Remember, an Executive Summary is written after the business plan is completed, but is read at the beginning of the process as a synopsized road map of what the reader will find detailed in the business plan.

The Executive Summary must contain direct answers to all of the questions at hand. These answers shall act as your recommendation to the situation/proposed business plan posed by the senior executives. Your final plan can agree or disagree with the executives' proposal(s); however, all reasoning must be fully supported by documented/tabulated evidence, gleaned from your research. As in any business report, the executives will be looking for quantified evidence (cost/savings) in support of your decision.

To summarize; a good Executive Summary provides the reader with clear and concise answers to all of the questions at hand. It tells them how much your plan will cost; will save, and will leave no questions unclear or qualified (never say "more information is required").

Marking the Reports

We will be using the following an Assessment Criteria for evaluating your Business Case Study Report submission.

|  |  |
| --- | --- |
| **Component** | **Component Weight** |
| **Executive Summary**  The Executive Summary must be to the point, concise and convincing - clearly identify what action or policies are to be established and most of all must give the reader everything they need to know to understand your recommendation(s) without feeling the need to necessarily read the body of the report. Any figures cited must be stated in the summary as a chart or table, or must be referenced to a chart or table that may lie in the appendix portion of your submission. | 40% |
| **Body of the Report**  The problems need to be identified, information needs to be presented, the solutions suggested, and the recommendations stated clearly.  Recommendations and detailed analysis should be informative, persuasive, and effective. | 40% |
| **Report Quality**  Grammar, spelling, sentence structure, organization, writing, presentation, appropriateness of data, etc. | 20% |
| **Total Score** | **100%** |

This Business Case Study is subjective in its nature, so it is up to you to present your case and then support it.

In addition to verifying how well you incorporated the instructions on how to write your report, the marker will be looking to see if your report answers the question(s) asked, and if clear and detailed recommendations for specific actions have been communicated. For example, if your report is vague in its recommendations, the marker's comment may just say that the report content is "vague". There will not be overly detailed comments on how you should have presented your case, or where you could have further expanded your strategy.

Your report will be returned to you within 3 weeks of submission.

# **Lab Projects Inc. (LPI)**

Lab Projects Inc. (LPI), is a start up hardware manufacturer that is about to launch a 10 inch industrial use tablet as its first product.  The tablet will operate using the latest graphics, RAM, andchipsets.  It is unique due to the proprietary new battery system that provides 20 hours of battery life.  The tablet is waterproof, sand and debris proof, and will withstand drop tests of up to five meters.  All test marketing indicates significant demand for this product in industrial use.

The company is considering the construction of a combination head office and warehouse/distribution centre in Toronto.  Based on the recommendation of a consultant, they have already entered into an agreement with a full service International Freight Forwarder who can provide international transportation services, customs brokerage, public warehousing in Vancouver and domestic transportation services.

Based on their research and initial business plan, LPI only intends to make the product available to customers in Toronto, Winnipeg and Vancouver during the first year of operation.  Anyone wanting to access this product in other markets will be able to do so through selected suppliers.

The business plan calls for 25% of the sales activity to take place in Vancouver with a similar 25% into Winnipeg and 50% to happen in Toronto. The terms of sale for any retail product will be price at Toronto warehouse door so there are no calculations necessary for domestic transportation of these goods.

The company, during the planning stages, is considering self-insurance against any losses that might occur as part of the transportation movement.  The tablets weigh 2 lbs. each and will have an average retail cost of $900.

After much R&D, it has been decided that the best complete package will be made up of a display that will be sourced from a manufacturer in Toronto.  The chipset will be imported from Korea; the graphics card will be imported from Taiwan and the case will be sourced from a distributor in Vancouver who imports them from Mexico.  Today, each supplier operates using an FOB term of sale for the raw materials.

**Your Challenges**

1. What are the ramifications of building a company owned warehouse in Toronto, for this new venture.  Explore the advantages and disadvantages and provide a recommendation on the development of a private warehouse as it is being considered.  Include at minimum, five advantages and five disadvantages of private warehousing.
2. A previous consultant recommended that LPI consider changing the incoterms from FOB on the inbound materials.  The consultant did not expand on the merits of such a change and the President of LPI has asked you to provide insight into this potential change.  She is interested in determining which term of sale would provide the greatest benefit to LPI. The inbound suppliers have indicated that they will only consider CIF, FCA, FOB, and EXW terms.  Provide a detailed analysis of each term and the advantages or disadvantages to LPI.
3. Several prototypes of the device were manufactured in advance costing approximately $35,000 each.  These prototypes were used as demonstration models at trade shows.  At the most recent trade show in Vancouver, an LPI salesperson requested that a fellow exhibitor transport the prototypes to Toronto for the next trade show.  The fellow exhibitor agreed to transport the prototypes with their own show materials at no cost.  During transit, all three prototypes were lost.  Describe the rights and liabilities that both LPI and the fellow exhibitor have as it pertains to the loss.
4. As a method of reducing freight costs, the President would like to self insure the finished product in transport to the customers.  The reasoning being that the tablets are rugged unpackaged to withstand normal industrial use and should be able to withstand in-transit handling.   The firm has a $25,000 deductible with its insurance provider. Describe in detail the impact of making such a decision.  Would you recommend self insuring this product for outbound transportation?