

Industry / Firm Analysis Guidance

Content requirements for the Industry/Firm Presentation
and Paper

Industry/Firm Analysis

Overview

- Firm – a single company (ex. Amazon, Apple)
- Industry – a sector of business (ex. Healthcare, Insurance)
- You may choose either a firm or an industry for this assignment
- You are expected to work in teams of two
- The output of this effort will be a Presentation and a Paper
- Please choose a Firm or an Industry and follow the content expectations on the following slides
- Presentation Time Limit – 10-15 minutes
 - Q&A Up to 10 minutes
 - Consistency of answers between the material in the presentation and the answers to questions is essential
- The paper must be at least 5 pages prior to the appendix
- The project must be submitted by email
 - The paper must be received prior to the end of class on 12/15/2015

General Presentation Outline

- Presentation (approximately 15 minutes – 8-10 slides)
 - Overview [Single Side]
 - Introduce and bound the Firm/Industry under analysis
 - External Analysis
 - SWOT, VIRO, or 5 forces (Not All) [2-4 slides]
 - Quantitative Assessment to support the conclusions and recommendations [3-8 Slides]
 - State the strategy in use by the Firm being evaluated
 - State the strategy in use by the Industry leader
 - Recommend if the strategy of the will continue to be profitable
 - If so why? If not Why not?
 - Capture the roll-out of recommendations and timeline for benefit for the company
 - Summary [1-2 chart(s)]
 - State the final position and key takeaways to strengthen your recommendation

Industry Presentation

- Overview what is the industry your team has chosen
- Identify the top 3 firms within this Industry
 - This can be by capitalization, by market share, or by a method of your choosing
 - The method must be explained
- Provide an external analysis that shows what environmental factors are impacting the Industry
 - Examples – new regulations, financial downturn, new market
- Identify the strategy employed by the most successful companies – (ex. cost leadership, differentiation, use the text)
- Based on your analysis will these strategies continue to be profitable
 - Should they stay on course (Why/Why not)
 - What should firms in this industry do to be more competitive
 - Provide a suggestion with quantitative analysis to support your recommendation
- Summary – conclude the brief with a comprehensive statement about your research and recommendations

Firm Presentation

- Identify the Firm being evaluated
 - Provide an Overview and cite the Firm's top 2 competitors
 - Provide a rationale for why these companies are competition
- Provide an external analysis that shows what environmental factors are impacting the Firm within its industry
 - Examples – new regulations, financial downturn, new market
- Identify the strategy employed by the most successful companies – (ex. cost leadership, differentiation, Integration, use the text)
- Based on your analysis will these strategies continue to be profitable
 - Provide a suggestion with quantitative analysis to support your recommendation
 - Should they stay on course (Why/Why not)
 - What should firms in this industry do to be more competitive
- Summary – conclude the brief with a comprehensive statement about your research and recommendations

General Paper Outline

- Executive Summary
 - An executive summary should always appear on its own page
 - The executive summary should be a narrative this element of the paper should flow and address all of the constituent elements.
 - For some guidance here is an additional resource
 - <http://www.wikihow.com/Write-an-Abstract>
- Overview/Introduction
 - What are the topics to be addressed in your paper
- Method
 - A qualitative description of your analytical approach and findings
 - A quantitative view of how you reached your conclusion
 - This is a collection of the facts that led you to make your recommendation with a projection of what future profitability will look like – These facts must be connected by a supporting narrative and projections for 3-5 years
- Conclusion
 - No more than half of one page that summarizes your findings and recommendations

For more detail see the recommendations for the outline assignment

General Paper Assignment

- Executive summary
 - This is the one page overview of the summation of your findings
- Introduction
 - Include a brief introduction of the entity and the problem to be assessed
 - Identify what the salient elements are that your team is focused on
 - State the suggested analysis and the expected outcomes
 - Close with the impacts of the findings on the organization being evaluated, and state the key insights and resolutions to the problems in the opening

General Paper Assignment

- Method
 - The Qualitative and Quantitative assessments
 - This is the external an internal analysis
- Conclusion
 - A short narrative of the recommendation with the numerical findings
- Appendix
 - Provide all of the financial references as tables/figures with captions (reference these in the body text as needed)
 - List all of the sources used as reference for this paper – must use at least 6

Industry/Firm Paper - Sections

- Executive Summary
- Overview / Introduction
- Discussion of External Factors
 - 5 forces, or a description of the external factors as you see them
- Discussion of Internal Factors
 - VIRO, SWOT, other
- Recommendations
 - Simple statement of changes to be made or why to stay on the current course
- Implementation / Roll-Out (time or indicator based)
 - How are the recommendations to be enacted
- Expected Financial Results
 - Based on recommendations what are your projections
- Appendix / Sources

Backup

APA Format

- Abstract (exec summary) – follow earlier guidance
- Introduction – follow earlier guidance
- Method
 - Qualitative – Why did you choose the factors you did? What makes them the most vital of the ones you could have chosen
 - Quantitative – What are the formulas to be applied? What are the analysis techniques you'll use to assess the facts you've assembled and data collected to make your case
- Results
 - The outputs of the Quantitative assessment with a narrative to explain the rationale for assumptions in the calculations
 - This is a short sections to address numerical findings and not the explanation and ramification of the findings
- Discussion
 - This is where the meaning of the findings that appear in the results are explained to the reader
 - This is also where the the paper is summarized and the impacts and projections appear – charts and graphs should appear in the appendix
- References – works cited reference