



## TPE 2023 – Case Study Mark Sheet

### Greentree

Marked by .....

Student name	Technical	Professional	Total mark

### Presentation and Approach (Professional Skills)

	Max	Marks	As a result of
Judgement	14		
Analysis (Method)	12		
Communication	12		
Ethical	12		
Total mark	50		

### Comments to Student

(any specific sections significantly impacting on overall mark – exception basis)

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**Industry analysis**

- 1.1 Market and competition
- 1.2 Distribution and marketing
- 1.3 Environmental issues
- 1.4 Minimum unit pricing
- 1.5 Health awareness

**New product assessment**

- 2.1 Flavoured vodka
- 2.2 Flavoured gin liqueur
- 2.3 Vodka alcopop
- 2.4 Recommendation

**Financial position**

- 3.1 Profitability
- 3.2 Cash and working capital
- 3.3 Debt
- 3.4 Security

**Quarterly accounts and draft business plan for the bank**

- 4.1 Analysis of qt'rly a/c's & bank cov'ts
- 4.2 Finance required
- 4.3 Staffing of the finance function
- 4.4 Recording & controls - finance info'n

**Offer from SBS**

- 5.1 Who is the purchaser?
- 5.2 Outline of offer & val'n of Greentree
- 5.3 Terms of the offer
- 5.4 Practicalities of the offer
- 5.5 Conclusion

**Potato futures slides**

- 6.1 Describe future
- 6.2 Why would Greentree use them
- 6.3 Example
- 6.4 Recommendation/alternatives

**Letter to Thomas**

- 7.1 Control of the company
- 7.2 Capital gains tax
- 7.3 Inheritance tax

**Total**

3			
2			
2			
1			
1		9	
8			
5			
5			
3		21	
1			
3			
2			
2		8	
4			
4			
2			
4		14	
2			
2			
3			
2			
1		10	
2			
2			
2			
2		8	
1			
3			
1		5	
75		75	

## Assessment of Competencies

### Judgement

The candidate addressed key items and had balance across the paper	20	40	60	80	100
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
The candidate provided an appropriate new product recommendation	20	40	60	80	100
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
The candidate provided appropriate recommendations for the business plan sections for the bank	20	40	60	80	100
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
The candidate demonstrated good commercial judgement	20	40	60	80	100
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

### Analysis (Method)

The candidate used an appropriate method of analysis of the industry	20	40	60	80	100
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
The candidate used a comparable method of financial analysis for the new products	20	40	60	80	100
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
The candidate used an appropriate method of analysis for the offer from SBS	20	40	60	80	100
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

## Communication

The candidate achieved all outputs and used sections, headings and cross-referencing, where appropriate	20	40	60	80	100
The candidate used appropriate language in each document and tailored their response specifically to Greentree	20	40	60	80	100
The candidate produced a good executive summary	20	40	60	80	100

## Ethical

SBS Offer: Unknown purchaser, quick deal, possible money laundering (Integrity) Withholding information of offer (Integrity)	20	40	60	80	100
Conflict of interest (Objectivity & Professional behaviour)	20	40	60	80	100
Bribery Facilitation payments (Integrity & Professional Behaviour)	20	40	60	80	100