



IVEY

Business
Foundations

BUSINESS 1220E/1299E

INTERSESSION 2023 ASSIGNMENT SCHEDULE

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10:00 a.m. - 12:30 p.m., Monday to Friday – Room 3315 Somerville House

1220E-Interession (Main): <https://bookstore.uwo.ca/product/88000106193> (ISBN: 88000106193)

1299E-Interession (Main): <https://bookstore.uwo.ca/product/88000106194> (ISBN: 88000106194)

Expect this course to be an intense six weeks – we will move quickly. Students are advised not to take on other activities or obligations during the course in order to successfully manage the required workload. There is a testing point every week in this course with no option for deadline extensions.

*The work noted for each class is to be completed by the student, individually, before reviewing solutions. Check **OWL** frequently for announcements, online postings, video links and other important course materials. Complete all work as listed to ensure adequate preparation for testing assessments.*

ACCOUNTING & FINANCIAL MANAGEMENT

MONDAY, MAY 15

		<u>Pages</u>
TOPIC:	Course Introduction and Financial Statements	
REFERENCE:	<i>Introduction to the Case Method</i>	6 +
ASSIGNMENTS:	Preparing a Statement of Earnings and Balance Sheet	
	1. Exercise 1, Buckeye Department Store Ltd.	43
	2. Exercise 1, Annie's Retail Florist	46

TUESDAY, MAY 16

		<u>Pages</u>
TOPIC:	Preparing and Interpreting Financial Statements	
REFERENCE:	<i>Introductory Note on Financial Statements</i>	12 +
ASSIGNMENTS:	1. Exercise 2, J. Sangster Retail Sales, Inc.	43
	2. Exercise 2, Johnson Hardware Store Ltd.	46

WEDNESDAY, MAY 17

		<u>Pages</u>
TOPIC:	Review - Comprehensive Financial Statements	
REFERENCE:	<i>Introductory Note on Financial Statements</i>	12 +
ASSIGNMENTS:	1. Exercise 1, Mason's Incorporated	48
	2. Lisa's Waterbed Emporium Inc.	110

TOPIC: Preparing & interpreting the Statement of Cash Flow
 REFERENCE: *Introductory Note on Financial Management* 54 +
 FINANCIAL STATEMENTS QUIZ ON OWL (DUE TOMORROW - THURS, MAY 18, 10am ET)

THURSDAY, MAY 18

QUIZ DUE 10:00 a.m. ET VIA ONLINE OWL SUBMISSION

Bring a printed copy of your completed quiz to class

TOPIC: Preparing & interpreting the Statement of Cash Flows (See OWL)
 REFERENCE: *Introductory Note on Financial Management* 54 +
 CASE: **The 10 Beach Hut** 114
 ASSIGNMENT: 1. Prepare a cash flow statement. Ensure you can complete all parts of the exercise on your own.
 2. Assess how the company is using their money to run the business in relation to cash from operating activities, financing activities, and investing activities.

FRIDAY, MAY 19

TOPIC: Preparing & interpreting Financial Ratios
 REFERENCE: *Introductory Note on Financial Management* 54 +
 ASSIGNMENT: 1. Complete Exercise 2, **Baxter** Distribution Co. Ltd. 105
 2. Complete the ratio worksheet and provide analysis of the ratios you have calculated
 TOPIC: Preparing Projected Financial Statements
 OWL: 1. Exercise 3, **Carson's** Ltd., ex. 1, 2, 3. – see assignment on OWL OWL
 ASSIGNMENT: • Assume cash is zero (for this exercise only)
 • Always use the bank loan as the plug, not cash. (all other cases)

MONDAY, MAY 22 – PROVINCIAL HOLIDAY - NO CLASS

TUESDAY, MAY 23

TOPIC: Cash Flow & Ratio Analysis
 CASE: **Gardiner Wholesalers (A)** 118
 ASSIGNMENT: 1. Analyze the Cash Flow Statement and financial ratios for ELEGANCE JEWELLERS - NOT S.D. Taylor. See OWL postings.
 2. Assess the overall financial position of the company.

TOPIC: Projected Financial Statements
 CASE: **Gardiner Wholesalers (B)** 128
 ASSIGNMENT: 1. Prepare a set of projected financial statements for Elegance Jewellers
 2. What are the future financial requirements for the company? (What does your plug suggest?)
 3. As Kathy Wilson, what recommendations would you make? Why?

TOPIC: Determining Financial Requirements for a Company
 Sensitivity Analysis, Risk Assessment and Seasonality
 REFERENCE: *Introductory Note on Financial Management* 54 +

WEDNESDAY, MAY 24

		<u>PAGES</u>
TOPIC:	Sensitivity Analysis, Risk Assessment and Seasonality	
CASE:	Maple Leaf Hardware	130
ASSIGNMENT:	<ol style="list-style-type: none">1. Analyze the Statement of Cash Flows and financial ratios.2. Prepare a set of projected statements.3. Considering inventory, AR & AP, which account is most sensitive to an increase or decrease in days? Why? How will a change in this account impact working capital needs? Hint: What will be the impact on the plug if Days Inventory increases/decreases 15 days? Discuss the appropriateness of the loan.4. Discuss any seasonal effects on the company's financing requirements.5. Given the information that Stuart Foreman has before him, how much money does Maple Leaf Hardware need?6. Evaluate the company's: Capacity to Repay, Character, and Conditions.7. As Stewart Forman, will you grant the loan? Provide support for your decision using the results of your analysis.	

THURSDAY, MAY 25

		<u>PAGES</u>
TOPIC:	Completing Comprehensive Financial Analysis	
CASE:	More Vino Ltd. – Expansion Proposal (practice exam)	148
ASSIGNMENT:	<ol style="list-style-type: none">1. As Arthur Greenway, assess More Vino's past financial performance utilizing the company's statements of cash flow and financial ratios.2. Prepare projected Statements of Earnings, Statements of Retained Earnings, and Balance Sheets.3. Be prepared to defend your analysis and assumptions4. What are More Vino's future financial requirements?5. What effect does your sensitivity analysis have on your plug figure?6. Perform a risk assessment.7. As Greenway, how will you respond to this request for funds? Based on your qualitative and quantitative analysis, provide detailed rationale for your decision.	

Note: Set aside four continuous hours to prepare this as a practice review case BEFORE viewing the link on OWL. Use the study guide to assist you and follow all exam instructions

FRIDAY, MAY 26

		<u>PAGES</u>
TOPIC:	Completing Comprehensive Financial Analysis	
CASE:	The Church Key : Unlocking Success	138
ASSIGNMENT:	As the account manager, do whatever analysis and make whatever recommendations you deem necessary. Defend and validate qualitatively and quantitatively.	

Note: Set aside four continuous hours to prepare this as a practice review case Use the study guide to assist you and follow all exam instructions.

ACCOUNTING & FINANCIAL MANAGEMENT EXAM
2:00 – 6:00 PM, Friday May 26, 2023. Room(s) TBA

MARKETING MANAGMENT

MONDAY, MAY 29

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MARKETING REPORT CASE RELEASED ON OWL
ONLINE OWL SUBMISSION DUE BY SUNDAY, JUNE 4, 2023, 6PM ET

TOPIC:	Introduction to Marketing	
REFERENCE:	An Introduction to Marketing Management	187 +
ASSIGNMENT:	1. Complete exercises in “ Marketing Short Problems ” (OWL posting).	
CASE:	Catfish Creek Canoe Company	215
ASSIGNMENT:	1. Define the marketing challenge that Davidson is facing. What factors must be considered in developing a pricing strategy? Use the marketing framework on Owl. 2. What selling price does Davidson need to charge to break even? How does the selling price change when a profit target is included in this calculation? 3. What price should Davidson charge? Validate qualitatively and quantitatively.	

TUESDAY, MAY 30

PAGES

TOPIC:	Comprehensive Marketing Analysis, Capabilities and Distribution	
CASE:	Omega Paw Ltd.	233
ASSIGNMENT:	<i>See additional questions on OWL. Prepare the case BEFORE viewing video link</i> 1. Define the marketing challenge that Ebert faces. 2. What are the relevant strengths and weaknesses of each competitor? Implications? 3. What market segment(s) should Ebert pursue? Why? 4. Analyze each of the four distribution alternatives considering both qualitative and quantitative factors. 5. As Ebert, which distribution alternative would you choose? Support your recommendations qualitatively and quantitatively.	

WEDNESDAY, MAY 31

PAGES

TOPIC:	Marketing a Service	
CASE:	SPEAKER LABS	255
	<i>See additional content on OWL</i>	
ASSIGNMENT:	1. What is the marketing challenge faced by Silverberg and Gladstone? 2. Perform an internal and external analysis. Implications to the marketing challenge? 3. Evaluate the strengths and weaknesses of Speaker Labs’ competitors. What is Speaker Labs’ competitive advantage? Implications for the marketing challenge? 4. Review the customer segments considering the Speaker Labs brand. Who should be the target market? Why? Implications for the marketing challenge? 5. Design a comprehensive marketing strategy for your chosen target market that addresses product, price, placement, and promotion. Validate your plan with qualitative and quantitative support from analysis.	
TOPIC:	Marketing Report Preparation Tips – <i>have the report case read by this point</i>	
ASSIGNMENT:	1. Use this and other OWL postings to assist you in preparing your marketing report.	

THURSDAY, JUNE 1

		<u>PAGES</u>
TOPIC:	Comprehensive Marketing Strategy	
CASE:	Mackenzie & Marr Guitars	241
	<i>See additional content on OWL</i>	
ASSIGNMENT:	<ol style="list-style-type: none">1. What are the major marketing challenges facing John Marr?2. Assess MMG's internal and external operating environment. Implications?3. Perform a customer and competitive analysis. What implications can be drawn?4. Select and rationalize a target market for MMG.5. Develop a comprehensive marketing plan around your chosen target market. Use qualitative analysis and the appropriate financial tools to validate your plan.	

FRIDAY, JUNE 2

		<u>PAGES</u>
TOPIC:	Comprehensive Marketing Analysis	
CASE:	Royal Ontario Museum	219
ASSIGNMENT:	<ol style="list-style-type: none">1. What is Carrie Martin's marketing challenge?2. Perform an internal and external analysis on the Royal Ontario Museum. How does this affect Martin's decision? What implications can you draw from this?3. Design a comprehensive, fully justified marketing plan for Friday Night Live.	

MARKETING MANAGEMENT REPORT
Online OWL Submission Due by Sunday June 4, 2023, 6pm ET
* Absolutely no extensions *

OPERATIONS MANAGEMENT / ENGINEERING ECONOMICS

MONDAY, JUNE 5

		<u>1220E / 1299E</u>
TOPIC:	An Introduction to Operations Management	
REFERENCE:	Introductory Note on Operations Management	284 +
ASSIGNMENT:	Operations Problems (see OWL posting)	

TUESDAY, JUNE 6

TOPIC:	Process Analysis, Process Flow	
CASE:	Workplace Safety Trainers	336 / 378
ASSIGNMENT:	<ol style="list-style-type: none">1. What factors are important to WST's customers? Rank these factors.2. Identify WST's current shipping process. Is this process appropriate? Explain.3. Draw WST's process flow and calculate the current capacity at each step in the process. Identify any bottlenecks and balance the line if necessary.4. If a developer is hired for ShipStation, how will capacity change? Discuss.5. If the sealing and labelling machines are purchased, how will capacity change?6. As Wang, what would you do? Provide detailed support from your qualitative and quantitative analyses.	

WEDNESDAY, JUNE 7

PAGES
1220E / 1299E

TOPIC: Comprehensive Case

CASE: Sweet Dairy Treats

342 / 384

- ASSIGNMENT:**
1. Perform a task analysis for SDT customers. Implications?
 2. Prepare a process flow diagram. Calculate the current and projected demand in boxes per month for each month of the year. What are the monthly capacities of ice cream production, cookie production, and sandwich production? What is the overall capacity in boxes per month? Will the capacity satisfy current demand? Will the capacity satisfy projected demand?
 3. Calculate the monthly box capacity after implementing each of the following changes: adding a mixing machine, increasing freezer storage, and hiring an additional employee. What is the new overall capacity per month and will it satisfy projected demand?
 4. Calculate the net benefit and payback of implementing the following proposed changes simultaneously: adding a mixing machine, increasing freezer storage and hiring an additional employee. What are the qualitative implications?
 5. Calculate the net benefit and payback of leasing the new equipment (instead of purchasing). What are the qualitative implications of this option?
 6. What would you do? Provide detailed qualitative and quantitative support.

THURSDAY, JUNE 9

PAGES

TOPIC: Comprehensive Case

CASE: Tiburon (practice exam)

348 / 390

- ASSIGNMENT:**
1. As a consultant to Nicole Verkindt, prepare a formal decision for the Tiburon case. Defend and validate recommendations by demonstrating fit with your qualitative and quantitative findings. Consider the following:
 2. Identify Tiburon's customers and perform a task analysis.
 3. For the sewing process, calculate Tiburon's capacity for each component (in kits per month) based on the current distribution of workers. Can Tiburon meet demand? Discuss.
 4. For each component in the sewing process, how many workers are required in order for Tiburon to meet demand? How many workers would Tiburon have to hire or lay off to meet demand? Discuss.
 5. What are the qualitative pros and cons and quantitative costs and benefits of staying with the current process? Implications?
 6. What would the capacity be (in kits per month) for the sewing process if Tiburon adopted the proposed changes and realized the expected results? Could Tiburon meet demand? How many workers are required to meet demand? Discuss.
 7. What are the qualitative pros and cons and quantitative costs and benefits of the proposed change in the sewing process? Implications?

Note: Set aside the continuous allotted time to prepare this as a practice exam case BEFORE viewing the link on OWL. Use the study guide and other OWL resources to assist you.

FRIDAY, JUNE 10

PAGES
1220E / 1299E

TOPIC: Comprehensive Case
CASE: Thicketwood Ltd.

332 / 374

Note: Unit contribution is 25% of selling price, not including labour.

- ASSIGNMENT:**
1. Conduct a task analysis for Thicketwood Ltd. Implications?
 2. Calculate the net benefit for the new router from High-Tech Inc. and the used router from TDL Products Co. Calculate the payback for the new router from High-Tech Inc. and the used router from TDL Products Co.
 3. Identify the qualitative and quantitative pros and cons of each CNC router.
 4. As Mark Taylor, which CNC router will you purchase? Fully justify and explain your decision.

Prepare the case BEFORE viewing video link on OWL

OPERATIONS MANAGEMENT EXAM: 2:00 – 5:30 PM, Friday June 9, 2023
ENGINEERING ECONOMICS EXAM: 2:00 – 6:00 PM, Friday June 9, 2023
Rooms TBA

ORGANIZATIONAL BEHAVIOUR

MONDAY, JUNE 12

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1220E / 1299E

OB GROUP REPORT CASE RELEASED ON OWL

THE OB REPORT MUST BE PREPARED AS A GROUP

Students are responsible for forming their own groups. See Owl for team contract forms

Individually prepared reports will not be accepted

ONLINE OWL SUBMISSION DUE by SUNDAY, JUNE 18, 2023 6PM ET

- TOPIC:** Teambuilding & Group Dynamics
REFERENCE: Introductory Note on Managing People in Organizations
CASE: Mission Group Work
- 359 + / 411 +
431 / 475
- ASSIGNMENT:**
1. What events led to the present circumstances between Louis Hoffman, Gabriel Specter, and the rest of the group?
 2. Consider the course's intended culture. What factors have caused the ongoing conflict in Team 7?
 3. How can the concepts of leadership, motivation, power and influence, and any other OB theory explain Team 7's dysfunction?
 4. What is the most critical problem between Hoffman, Specter, and the rest of the group? Who should be held accountable for this conflict? Why?
 5. Why is Gina Pearson's decision important, going forward?
 6. As Pearson, develop a detailed plan outlining a course of action for the immediate future and for the long term. Be prepared to explain and support your plan.

TUESDAY, JUNE 13

		<u>PAGES</u>
TOPIC:	Culture and Leadership	1220E / 1299E
CASE:	Libro Credit Union	445 / 489
ASSIGNMENT:	<ol style="list-style-type: none">1. Examine the situation at Libro. What roles, issues, and objectives are involved?2. What are the symptoms and root causes of the abiding cultural differences between former Libro and United employees?3. What criteria should be used to make a decision, and how will they be measured?4. As Goodine, how will you proceed? Be prepared to support and justify your plans based on your analysis.	

WEDNESDAY, JUNE 14

		<u>PAGES</u>
TOPIC:	Introduction to Unionization and Employee Conflict	
CASE:	Carl Jones (A)	419 / 463
ASSIGNMENT:	<ol style="list-style-type: none">1. Examine the group dynamics in the engineering department.2. How has McLaughlin's organizational structure affected Carl and Joe?3. Compare Carl and Joe with respect to power and leadership within the engineering group. What other OB theories can explain the situation?4. Did Joe break any rules according to the collective agreement? As Carl Jones, how would you proceed? What criteria should be considered?	

THURSDAY, JUNE 15

		<u>PAGES</u>
TOPICS:	OB Group Report Preparation	
CASE:	OB Report Case	OWL
ASSIGNMENT:	Analyze the OB report case individually using the OB framework and other resources on OWL to guide you. Discuss your analysis, alternatives, decision criteria and validated recommendations. Discuss your thinking with your OB group and listen to others' perspectives on the case. Use high-functioning team techniques to compile, draft, edit and complete the OB group report assignment.	

Come to class with any questions you have about the report. Note: You should also have already submitted your team "Report Values" form and be in a self-selected group.

TOPICS:	Special Organizational Behavior Challenges	OWL
CASE:	VCayr: Managing Sexual Harassment – Graphic Novel Version <i>This case outlines instances of sexual harassment and assault. These topics may be intellectually and emotionally difficult for some readers, especially those who have experienced an assault. In a safe setting, we intend to empathetically engage in discussion, with an aim to better our understanding of how these agonizing situations can be prevented in organizations.</i>	
ASSIGNMENT:	Please refer to OWL to access this case. <ol style="list-style-type: none">1. What is the wrongdoing depicted in the case?2. What should Johnson do, if anything? Immediately? Mid-term? Long-term?<ol style="list-style-type: none">a. Options that primarily focus on punishing the harasser?b. Options that primarily focus on protecting the accuser or the survivor?c. Options that primarily focus on saving VCayr from legal action? Consider the pros and cons of each of your suggested options. Validate your thinking using OB tools to support your position.	

FRIDAY, JUNE 16

TOPIC:	OB Group Report Work Period	
CASE:	OB Report Case	OWL
ASSIGNMENT:	Use this time to perform as a high-functioning team and work on your OB group report.	

ORGANIZATIONAL BEHAVIOUR GROUP REPORT
Online OWL Submission Due by Sunday June 18, 2023, 6pm ET
One submission per group
* Absolutely no extensions *

GENERAL MANAGMENT

ACCOUNTING, FINANCIAL MANAGEMENT, MARKETING MANAGEMENT, ORGANIZATIONAL BEHAVIOUR AND OPERATIONS MANAGEMENT (ENGINEERING ECONOMICS) will be applied in this unit, which is worth 30% of your final mark. Take this opportunity to finish the course with style!

MONDAY, JUNE 19

		<u>PAGES</u> 1220E / 1299E
TOPIC:	Introduction to General Management, Firm Valuation (see OWL link)	
REFERENCE:	An Introductory Note on General Management Can, Want, Need Analysis	454 + / 498 +
CASE:	Meadowlark Shopping Centre	478 / 522
ASSIGNMENT:	<ol style="list-style-type: none">1. Identify what Wieland Wettstein and his partners "Want" to do. Implications?2. Identify what Meadowlark "Needs" to do in order to be successful. Implications?3. Identify what Meadowlark "Can" do. Implications?	

TUESDAY, JUNE 20

		<u>PAGES</u>
TOPIC:	Valuation	
CASE:	TLO Developers	490 / 534
ASSIGNMENT:	<ol style="list-style-type: none">1. As an external consultant to Leah Graham, perform quantitative analysis for each alternative: (1) Status Quo, (2) Office Development, (3) Hotel Development, and (4) Taking over the Parking Lot for TLO.2. Perform a Net Book Value, Economic Appraisal and Capitalization of Earnings valuation. Determine and validate a suggested selling price for TLO. Use qualitative and quantitative factors to support your decision.	

WEDNESDAY, JUNE 21

PAGES
1220E / 1299E

TOPIC: Comprehensive Decision Making

CASE: **Big Viking Games**

524 / 568

- ASSIGNMENT:**
1. What are Thomson's personal goals? What goals does he have for BVG?
 2. Evaluate the external environment and discuss the factors that will affect Thomson's decisions. What are the industry key success factors? (KSFs)
 3. Perform an internal analysis of BVG. How will MAG's internal strengths and weaknesses affect strategic choices? Identify BVG's competitive advantage(s)
 4. Evaluate the alternatives presented in the case from both a qualitative and quantitative perspective. Use whatever analytical tools are appropriate for each alternative. (projected statements, net benefit, payback, breakeven, valuation).
 5. As Greg Thomson, what would you do? Validate your thinking qualitatively and quantitatively based on analysis.

THURSDAY, JUNE 22

PAGES

TOPICS: Comprehensive Decision Making

CASE: **Snakes & Lattes Inc.** (practice exam)

536 / 580

- ASSIGNMENT:**
1. Evaluate Ben Castanie's personal and professional goals. Implications?
 2. Evaluate the opportunities and threats of the external environment. How should this affect the company's strategic decision?
 6. Evaluate the strength and weaknesses of SL's internal capabilities. How should this affect Castanie's strategic decisions?
 3. What are the company's key success factors? What is its competitive advantage?
 4. Perform a qualitative and quantitative analysis for each of the options presented in the case. Implications?
 5. How much is Snakes & Lattes worth? Implications?
 6. What is your recommendation(s)? Support this recommendation(s), based on your analysis, with qualitative and quantitative validation.

*Note: Set aside four continuous hours to prepare this as a practice exam.
Use the study guide and other Owl resources to assist you. Follow all exam instructions.*

FRIDAY, JUNE 23

PAGES

TOPIC: Comprehensive Decision Making

CASE: **Cafezia Coffee: Brewing Entrepreneurial Success**

512 / 556

- ASSIGNMENT:**
1. As Natalie White, analyze the situation Cafezia finds itself in. Do whatever analysis and make whatever recommendations you deem necessary. Defend your position qualitatively and quantitatively.

Note: Set aside four continuous hours to prepare this as a practice review case. Use the study guide and other Owl resources to assist you. Follow all exam instructions.

GENERAL MANAGEMENT EXAM
2:00 – 6:00 PM, Friday June 23, 2023
Room(s) TBA

**THE GENERAL MANAGEMENT FINAL EXAM
IS WORTH 30% OF YOUR COURSE GRADE**

HAVE A SAFE AND HEALTHY SUMMER
