

## IS 2200 - Business Letter with Data Analysis/Pivot Tables – (100pts)

### Perez POPS wants to Expand!

Katie is really impressed with all your work so far! She has just found out that there is a shop in the shopping center where she plans to open where the owner is looking to sell his bakery. BakeIT!

Katie wants you to look at BakeIT numbers and help her decide if this is the kind of business that would work well with hers and she might consider taking on BakeIT's products as part of the Perez POPS Family.

After you have completed the analysis, she has asked that you write a formal business letter to her investor, Mr. Sikes, with your recommendations and the details of what you found in your analysis.

#### Players:

Katie Perez – owns Perez Pops

Mr. Sikes – an outside investor. He knows Katie but does not work for Perez Pops.

You the student – You have your own consultant company and Katie has hired you to do some research on BakeIT!

BakeIT! Owner – has provided the sales data for his company.

#### What to do:

#### Analysis/Pivot Tables

1. Use the attached Excel data file to analyze and create the appropriate pivot tables needed to provide the appropriate information for the following. Place each pivot table on its own worksheet and label each appropriately for each question:

Bake-It is a local company in Kennesaw, GA which has a store front location in the same shopping center where Perez POPS will be opening. The owner is considering making a move out of town and has approached Perez POPS about possibly buying their existing business. Bake-It sells two ways. They sell direct to customers in the Kennesaw Location, and they also ship to several cities and states throughout the US where independent shops sell Bake-It's goods.

Bake-It's owner has provided raw data of the sales from 2020, 2021 and 2022. They sell 2 primary categories of products. First, they sell Soft Baked Cookies. Cookies are large and can easily feed 2 people as a dessert or snack. and second, they sell Trail Bars. Trail Bars are sold in mini bags with multiple bars in the bag. They are chewy, hearty muffin cookie hybrid snacks that are lower in sugar and use local honey to sweeten. All of the Bake-It products are organic which does have higher costs, but they think it's worth it!

Katie CEO of Perez POPS needs you to analyze this – should they ask the investor to help them take over the Bake-It business?

Create 4 Pivot Tables to answer the following questions:

1 – What are the top products by category for each year that are sold at Bake It? (Hint look at this in terms of Units sold and Dollars)

2 – What is the top selling product for each of the years?

3 – What is the most profitable product in each category? (Hint, you will need to create a formula

to calculate profit)

4 – Which city orders the most per year dollar wise each year? (Hint, you will need to pick a city outside Kennesaw each year as the answer)

2. Name file yournamebakeitsales.xlsx.

### **Business Letter Recommendation to Investor: Read instructions carefully!**

Write a formal business letter to Katie's investor, Mr. Sikes, with your recommendations and the details of what you found in your analysis.

Refer to Memos and Business Letter links in Effective Messages Module in D2L for the proper business letter format or use Google or check out your word processor for a business letter template. The letter itself should have a complete and correct standard business letter format. Appropriate language and tone should be used throughout the letter.

In addition to the correct structure, your letter should include:

1. Introduction
2. Create your own letterhead. You may use a Word template customized with your consultant information or adding information/graphics etc. to the header and footer.
3. **You are working for Katie Perez, owner of Perez POPS. You** have completed the analysis on the BakeIT! business and will share the information with Mr. Sikes (possible investor) and make a recommendation.  
Mr. Wesley Sikes, CEO  
Investiture Inc.  
4550 Main Street NW  
Alpharetta, GA 30022
4. **Integrate the 4 pivot tables in an informative and useful way to answer the questions regarding the BakeIT! Sales and store data.**
5. Create a Word table that provides the pros and cons for acquiring and investing in the BakeIT! business for Perez POPS.
6. Include your recommendation based on the data.
7. Conclusion
8. Name your file: yournamebusletter.docx

### **What to Submit:**

1. Submit your Pivot Table Analysis (Excel) document to D2L. A link is not acceptable. (Additionally Numbers files and Google Sheets are unacceptable) You must submit the Excel file.
2. Submit your Business Letter (Word Doc) document to D2L. A link is not acceptable. (Additionally Pages files and Google Docs are unacceptable) You must submit the Word file.

Please refer to the following grade rubric to ensure that you accounted for all components of the assignment.

<b>Criteria</b>	<b>Possible points</b>
Spelling and grammar	5 points
Correct business letter format and logo	10 points
Introduction and Conclusion	10 points
Pivot Table Data is integrated into the document narrative. Not as attachments at the end of the letter. Integrate means to put the pivot tables into the letter.	15 points
Table – one you create in Word and your recommendation Professional content and writing and components of a business letter.	25 points
Excel - Pivot tables created in the Excel accurately and completely answering the analysis questions using Pivot tables.	30 points
Files submitted accurately – Excel file and Word doc file – not Pages, Numbers, Google Sheets or Docs, Not as a PDF or any Links to files.	5 points