**AY25/26 – August Term   
ACCT679 Group Project (35% of Total Grade)**

1. **Background**

THE OPTIMA HEALTH DEVICES (OHD) is a regional provider and distributor of medical equipment. It operates in the CLMV region (Cambodia, Laos, Myanmar, and Vietnam) and currently maintains five regional offices. You are the financial controller of the XXX regional office.[[1]](#footnote-0)

It is now early 2025. You have been requested to participate in an upcoming meeting organized by your senior management team to discuss the company’s strategic direction for the coming year (i.e. 2025). To support your preparation, your finance team has compiled relevant data and made it available in the accompanying “OHD Data” folder.

1. **Visualization and Report (25%)**

***2.1. Visualization***

The senior management team wants to better understand the overall performance of the company over the last few years and how it is expected to do in the coming year. In this respect, it has requested for you to prepare a **comprehensive** **visualization** that covers the following aspects:

1. Analysis and insights into the performance of **your regional office** over the 5-year period from 2020 to 2024.
2. Analysis and insights into the performance of your regional office compared with other regional offices over the 5-year period from 2020 to 2024.
3. Time series forecasts of sales in 2025 (where appropriate, you may also use Excel models for this).
4. Relevant business insights.

You should submit **one Tableau Story or, alternatively, multiple dashboards** to provide the senior management team with the relevant updates/information.[[2]](#footnote-1), [[3]](#footnote-2)

***2.2. Report***

The senior management team has also requested for your team to submit an accompanying **≤ fifteen-page written report** about your Tableau visualization (double-spaced, Times New Roman font size 12). This page count **does not include** cover and content pages, figures/graphs/tables/etc, appendices, bibliography, etc.

The write-up should highlight the following:

1. Key insights that the senior management team will be able to obtain from the visualization and why this is important to them.
2. Considerations behind key design choices that your team made in developing the Tableau Story/Dashboards.
3. Considerations/details about the time series forecasts that you made.
4. Other relevant insights/details, where appropriate.
5. **Group Presentation (10%)**

The senior management team has requested for your team to deliver a **15-minute presentation (inclusive of Q&A)** to brief them on your findings. The presentation should cover key insights from your Tableau visualization and report.[[4]](#footnote-3)

1. **Project Submission**

Soft copies of your final report, Tableau file, presentation slides, and other supplementary files (if required) should be submitted via eLearn (Assignments 🡪 Group Project) by **23:59hrs on Tuesday, 4 Nov 2025**.

**Report / Slides Due : 4 Nov 2025 before Midnight**

**Presentation: 5 Nov 2025**

**Appendix – Profile of OHD’s Senior Management Team**

OHD’s senior management team consists of the following three members:

Lisa Chan – Chief Executive Officer

* Founded the company in 1993.
* Extremely knowledgeable about the healthcare industry, with over 30 years of experience in the industry and the CLMV region. Was the general manager for the Ho Chi Minh (from 1993) and Hanoi (from 2010) regional offices until 2015.
* Fairly proficient in accounting/finance.
* Uncomfortable with data technology.
* Focus is on developing a set of strategic plans to fuel OHD’s next phase of growth.

Andrew Lee – Chief Operating Officer

* Joined OHD in 2021.
* Limited expertise in data technology.
* Only has limited familiarity with the healthcare industry and with the operations of OHD having only recently joined the company. His previous work experience was in the software industry, covering the CLMV region.
* Basic proficiency in accounting/finance.
* Focus is on implementing OHD’s business strategy and monitoring overall business performance.

Tommy Cole – Chief Financial Officer

* Joined OHD in 2014.
* Proficient in data technology.
* Expert in accounting/finance.
* Is familiar with the healthcare industry and OHD. Was the financial controller for OHD’s Yangon regional office from 2014 to 2019.
* Focus is on monitoring OHD’s financial performance.

1. Note: Each group will be assigned to a regional office in Week 3. [↑](#footnote-ref-0)
2. Ensure that your Tableau file is saved as a **Packaged Workbook (\*.twbx format)** – I will not be able to access Tableau files saved in any other format. [↑](#footnote-ref-1)
3. You may use data from external sources in your analysis. You may also make appropriate assumptions about OHD, its operating environment, and the data provided where appropriate. All external data sources and assumptions should be clearly referenced in your accompanying report. [↑](#footnote-ref-2)
4. All members of the project team should participate in the presentation. [↑](#footnote-ref-3)