

**Project Learning Objectives:**

Students will be able to...

1. Apply most of the key skills, concepts and methodologies covered in Integrated Foundation including applying evidence-based analysis throughout the business plan and explicitly stating assumptions that underpin the analysis;
2. Design a business plan that recognizes the interdependencies among the functional areas discussed in Integrated Foundation;
3. Demonstrate a critical analysis based on a realistic assessment of the business opportunity, ensuring that the conclusions and inferences are drawn flow from evidence-based analysis;
4. Demonstrate effective teamwork and appraise the strengths and weaknesses of their improved contributions to team processes; and,
5. Demonstrate effective team presentation skills, with an emphasis on achieving project objectives.

## Business Plan Project Rubric for Report + Presentation

### PROJECT REPORT: 75% OF TOTAL GRADE

| ELEMENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Exceeds Expectations 85-100                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Meets Expectations 75-84                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Does not Meet Expectations <75                                                                                                                                                                                                                                                                                                                                                                                                                                               |
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| <b>Key concepts, skills and methodologies referenced in Business Plan</b><br><b>20% of report grade</b><br>Did teams use Business Model Canvas, Marketing Concepts, Business Plan/Blue Ocean Strategy processes and Key Strategy Concepts, Key Accounting Concepts, Key Leadership/OBHR concepts, Key Operations concepts?                                                                                                                                                                                                                                   | <b>A selection of key concepts</b> , skills and methodologies were not only used during the process of creating the business plan, but they form the back-bone and structure of the analysis.                                                                                                                                                                                                                                                                                                                                                                                                 | <b>Some key concepts</b> , skills and methodologies were evident and relevant to the analysis.                                                                                                                                                                                                                                                                                                                                                                                                                                              | <b>Key concepts</b> , skills and methodologies were <b>missing</b> from the business plan or only used in ad hoc ways.                                                                                                                                                                                                                                                                                                                                                       |
| <b>Integration and Interdependencies</b><br><b>10% of report grade</b><br>Have the principles/models from different business disciplines and how they impact each other been identified and utilized in the development of the business plan?                                                                                                                                                                                                                                                                                                                | An in-depth, coherent analysis - <b>clearly demonstrates how criteria/principles from various business disciplines are integrated</b> and evaluates the impact that decisions in one area can have on other aspects of the business.                                                                                                                                                                                                                                                                                                                                                          | Basic analysis <b>considers how criteria/principles from various business disciplines impact each other</b> in the business plan.                                                                                                                                                                                                                                                                                                                                                                                                           | A weak analysis - <b>minimally applies criteria/principles from various business disciplines</b> to the business plan.                                                                                                                                                                                                                                                                                                                                                       |
| <b>Research and Analysis leading to Business Decisions</b><br><b>40% of report grade</b><br>Does the business plan demonstrate that the team has gathered sufficient, credible, relevant information to support the plan? Is the factual evidence stated and clear? Are the assumptions that underlie the analysis clearly stated? Does the plan indicate connections between the evidence and reason leading you to thoughtful, logical conclusions or solutions, e.g. finding meaning? And are the business decisions based in clearly presented evidence? | Information and facts are clearly, succinctly and appropriately supported by a combination of means. <b>Analysis asks in-depth questions</b> and makes insightful inferences from information provided or claims made. <b>Strong connections</b> are made between the ideas and issues in the business plan – <b>synthesizing the analysis and providing background</b> to key business decisions. Demonstration of critical analysis based on a realistic assessment of the business opportunity. Demonstration that the conclusions and inferences drawn flow from evidence-based analysis. | Information and facts are generally clearly presented using appropriate means. <b>Analysis asks questions</b> about information provided and claims made. <b>Some connections</b> are made between the ideas and issues in the business plan with <b>some evidence-based analysis</b> supporting business decisions outlined. At times demonstrates some critical analysis based on a realistic assessment of the business opportunity. Sometimes demonstrates that the conclusions and inferences drawn flow from evidence-based analysis. | Information and facts are poorly presented, inaccurate and confusing. Assumptions are either not <b>stated</b> or wildly unreasonable. <b>Analysis is missing</b> . Weak identification of relevant issues and <b>missing connections</b> to evidence in making business decisions. <b>Offers unsubstantiated opinion</b> rather than evidence-based analysis. Does not demonstrate a degree of critical thought or skepticism in evaluating how realistic their claims are. |

| ELEMENT                                                                                                                                                                                                                                                                                                                           | Exceeds Expectations 85-100                                                                                                                                                                                                                                                                                                                                                                                                  | Meets Expectations 75-84                                                                                                                                                                                                                                                                                          | Does not Meet Expectations <75                                                                                                                                                                                                                                                                                                                                      |
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| <b>Creating Shared Value (CSV)</b><br><b>10% of report grade</b><br>Identifies and describes sustainability issues (climate change, energy use, waste management); Develops management tools for responding to CSV challenges; Recognizes the multi-disciplinary and integrated nature of CSV.                                    | Business plan <b>clearly identifies in detail the sustainability issues at play and the way they affect the plan</b> , how they create value for the company as well as society. The team exhibits a superior understanding of the <b>possible management tools for responding to CSV challenges</b> and suggests practical solutions while recognizing and drawing from a variety of disciplines in setting out a CSV plan. | Business plan <b>identifies important sustainability issues at play and the way they affect the plan</b> . The team develops a <b>plan to respond to CSV challenges</b> and appreciates the contributions of a variety of disciplines and methodologies.                                                          | Business plan indicates a <b>vague idea of what the sustainability issues might be in the business</b> . There is <b>difficulty in developing a plan for a basic CSV approach</b> for the business or CSV has been completely ignored or just “tacked on” with no understanding of the importance of the multi-disciplinary perspective to solving a CSV challenge. |
| <b>Process: Innovation and Creativity</b><br><b>10% of report grade</b><br>Creative/innovative approach to the process of developing the business plan from idea to implementation solutions.                                                                                                                                     | The team has “gone the extra mile” in terms of <b>using creative thinking processes</b> to arrive at an <b>innovative</b> and highly unique/unusual business plan.                                                                                                                                                                                                                                                           | The team embraced <b>some creative thinking processes</b> to arrive at a business plan that exhibits <b>some aspects of an innovative/creative</b> approach.                                                                                                                                                      | The business plan is <b>singularly lacking in any creative processes</b> , ideas or approaches.                                                                                                                                                                                                                                                                     |
| <b>Written Communication/Report:</b><br><b>10% of report grade</b><br>Scope & Focus on task-at-hand (the business plan); Argumentation & Analysis (observations/insights); Organization & Structure; Syntax & Command of Language; Consistency (ideas/assertions in one part of plan not contradicted later). Grammar/Formatting. | Written report <b>focuses on all aspects</b> of the business plan, presents an appropriate depth of <b>original and innovative argumentation</b> & analysis, and presents information in <b>sophisticated flow</b> with appropriate communication methods with well-cited support from reputable sources, <b>written skillfully</b> to hold the reader’s attention with accurate grammar, formatting – well proofread.       | Written report is <b>reasonably focused</b> on the scope of the business plan, argumentation and analysis are <b>clear and understandable</b> , information flow is <b>logical and consistent</b> , and argument is appropriately cited, written in clear and direct English with correct grammar and few errors. | Written report and writing is <b>unfocused and out-of-scope</b> , argumentation and analysis are rambling or contains serious errors, <b>organization is poor</b> , information lacks detail and relevant data and is poorly cited, presence of <b>errors and mistakes – poorly proof-read</b> .                                                                    |

**THE PROJECT ORAL PRESENTATION: 25% OF TOTAL GRADE**

| ELEMENT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Exceeds Expectations 85-100                                                                                                                                                                                                                                                                                                                                      | Meets Expectations 75-84                                                                                                                                                                                                                                                                                                                                           | Does not Meet Expectations <75                                                                                                                                                                                                                                                                                                                                |
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| <b>Presentation Style:</b><br><b>30% of Oral Presentation Grade</b><br>Physical (speech, visual) – involvement and connection with audience;<br>The “Wow” Factor – originality and creative stimulation.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | <b>Team members were easily understood</b> and used body language, visual aids and eye contact to <b>effectively interact with audience</b> ; key components of the issue were <b>engaging and audience-focused</b> ; the “wow” factor was high in terms of audience impact.                                                                                     | <b>Team members were intelligible</b> but with limited eye contact and a few distracting nervous habits, <b>adequate visual aids</b> used; some key components of the issue interesting enough to <b>maintain audience attention</b> .                                                                                                                             | Team members are often <b>hard to understand</b> with habits that distract the audience with very little eye contact and too little visual content; little effort to engage the audience.                                                                                                                                                                     |
| <b>Presentation Content:</b><br><b>70% of Oral Presentation Grade</b><br>Scope & Focus on Business Plan<br>The Pitch (content, persuasion)<br><br><b>Organization</b> of the presentation: Is the structure well organized? Is the objective apparent?<br><br><b>Analysis:</b> How effectively do you use and communicate the various analyses that are relevant to your report? Does the content support the objective? Is the data chosen convincing? Are the examples, stories and analyses relevant?<br><br><b>Integration:</b> How well does your presentation tie together in an appropriate way, the various disciplines of the Integrated Foundation to develop your report?<br><br><b>Response:</b> How well do you answer questions, in terms of content? | Presentation focused on the essence of the business plan and its integrated components; <b>content of presentation was well-organized</b> and coherent; key components of the issue including analysis were <b>engaging and audience-focused</b> ; conclusions were supported by evidence; <b>succinct and confident responses to questions were delivered</b> . | Presentation adequately addressed the key messages in the business plan and its integrated components; content <b>organized and respectful of time limits</b> ; some key components of the issue including analysis determined with <b>fairly persuasive</b> arguments and conclusions supported by evidence; <b>answers to questions are clear and on point</b> . | Presentations strays off the point of the business plan and there is no reference to integrated components; presentation is <b>poorly organized</b> and ideas are unclear; key components are vague and arguments are <b>not persuasive</b> with conclusions/recommendations not tied to evidence; <b>answers to questions are off-topic and/or unclear</b> . |