

**FINANCIAL MANAGEMENT 2910**  
**FM Reports**

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**1. PURPOSE**

The purpose of the FM reports is to give the student:

- a. an opportunity to analyze an organization first-hand by visiting that organization, talking to key personnel and seeing the actual production of its product or service.
- b. an opportunity to see how organizations apply the theory learned in the classroom to actual situations.
- c. practice in obtaining information from an organization necessary for the preparation of a report.
- d. practice and experience in analyzing functions of an organization.
- e. practice in operating as a team of consultants analyzing an organization.
- f. an opportunity to make a formal oral presentation before a large group.
- g. experience in designing a formal presentation using audio-visual equipment and techniques.

**2. PROCEDURE**

- a. Each set will form three groups of between 5 to 8 members. Each group will be called a syndicate.
- b. From each set, one student will be selected to become a member of the overall FM Reports Coordinator Group.
- c. Each group will select an appropriate organization, preferably a business firm, to analyze. This selection should be chosen very carefully, since the choice is crucial to the presentation. The selection should be presented to the Coordinator Group at the earliest possible opportunity, since there is no duplication allowed, and the scheduling will probably be arranged according to the date that the selection was presented to the Coordinator Group. In any case, submission of your organization to the Coordinator Group must be made no later than January 30th.

## 5. MARKS

The marks for the project are 100. These are allocated as follows:

Oral presentation	<u>100</u>
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Breakdown:

a. Use of a/v in presentation	30
b. Coverage of topic:	20
– history	
– organization structure	
– product/service “story”	
– financial aspects	
c. Speech	30
d. Presentation	20

## 6. ORGANIZATIONS TO BE ANALYZED

It is suggested that the organization to be analyzed be a small- to medium-sized organization, rather than a large and complex one. The size and complexity of a large organization makes it difficult to analyze. You should be very careful about the selection process. If you are turned away by one or two firms, don't let it deter you. A good method for analyzing the firm before you enquire, is to use a grid. On one side put the presentation coverage, history, etc., and on the other side rate these (good, fair, poor). If you do this for several types of firms, you will be able to see in advance some of the difficulties you may encounter.

## 7. CONTACTING THE ORGANIZATION

Contact a senior member of the organization and ask permission to do the study. Ensure that the organization has not been previously done within the last year. A list of organizations presented last year are as follows:

McDonald's	Mushroom Studios
B.A. Blacktop Mobile Data International	Molson's
Olympic Fitness	Vancouver Canucks
Neon Works	KSFN '97
BC Transit	Canski
Granville Island Brewery	TIR Systems
IKEA	BCAA
BC Lions	

An initial mark for each group is to be awarded using the system referred to above. Marks are not to be returned to any group or student, but are to be kept in strict confidence and submitted to the instructor for final adjustments and disposition.

- vi. The Coordination Group is responsible for ensuring that the schedule of presentations is adhered to and any change to such schedule must be approved by the Coordination Group. In any case, all presentations must be completed by the end of the scheduled period.
- vii. The Coordination Group must ensure that each group has returned borrowed equipment when the presentation is complete.
- viii. The Coordination Group is responsible for mediating problems within and among groups.
- ix. The Coordination Group will make a presentation after all other presentations have been made. It should be of the same length and cover the "highlights" of the presentations during the term. Awards may be given for such things as:
  - most humorous presentation
  - most effective presentation
  - most original presentation
- x. The Coordination Group will submit a report to the instructor responsible for the workshop. The report should include:
  - problems encountered during the workshop.
  - recommendations for improvement.
  - other topics the group wishes to include.
- xi. The Coordination Group should ensure that a thank you letter is sent to each organization from the presenting group.
- xii. The Coordination Group should ensure that all posters are removed and that the presentation theatre is cleaned up after each presentation. Marks will be deducted from a group that does not do this follow up.