
CAPSTONE PROJECT

As the newly appointed Chief Executive Officer (reporting to the Board of Directors), you are responsible for strategic planning and the alignment of people, processes and resources needed to implement your long-term vision.

Through this project you will apply what you have learned in the _____ to a real-world situation. Your task is to convince your Board that you have a credible plan that will not only improve the organization's performance over the next year, but position the company for significant long-term growth that will keep it ahead of the competition.

This project has two components:

1. Board Presentation Game Plan (Due: Week 7)

_____ designed help you gather and organize the information that will be a part of the presentation of your strategic plan. It is organized as a "Game Plan" designed to help guide you through your preparation for your presentation to the Board. While such documents can never be exhaustive, this experience should provide you with a model that will not only help you prepare for Part 2 _____ but can be a useful tool as you continue your career beyond _____

2. Video Presentation to the Board of Directors (Due: Week 10)

Your final deliverable in your program at _____ the presentation of your plan. This is your opportunity to convince your Board that you have created an inspirational and achievable strategy for the future AND that you are the person who can execute the plan.

Guidance on Selecting an Organization for Your Capstone Project

- The _____ requires that **current, accurate, and objectively verifiable data be used**. This includes financial data and any other information required for your analyses, recommendation, and implementation. Thus, you must choose a publically-traded company or an organization for which audited financial statements are available.
 - If you select a publically-traded company, you are expected to use their annual and semi-annual/quarterly reports as part of your analysis of the organization and market.
 - If you choose a privately-held company, you must include independently audited financial data that is sufficiently detailed to support your analysis. Self-reported financial (and other) information is suspect, since those who provide the information often have something to gain by portraying their organizations in a certain way to the public.
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- You are **encouraged to choose your own employer or a competitor in your sector** for your Capstone Project. This allows you to work with an organization and issue that has a direct impact on your professional life and for which you likely already possess a fair bit of expertise. If you are unable to use either of these for the Project, you may choose another company.
 - Finally, the Capstone Project requires that you **identify an issue that is significant enough to warrant the attention of a CEO**. You will receive additional guidance on this from your course instructor. You will also have opportunities to receive feedback on your proposed plan through the weekly Discussion Questions. It is to your advantage to post to the discussions early and to pay attention to the feedback you get from fellow students and from your course instructor.

Note: If you have any questions about your proposed organization and the sufficiency/validity of the data, please discuss this with your instructor as soon as possible. It is not the responsibility of the course instructor to help you locate or secure required data.

Evaluation of Project Submissions

In developing your submissions for Part 1 and Part 2 of your Project, you are expected to draw on the knowledge and skills you have developed throughout your time at

Because this is a course, its focus is on helping you synthesize what you have learned in previous courses in the program, and on analyzing and deriving meaning from complex information. You must demonstrate that you have identified which data is most relevant to the present circumstances of your chosen organization *and* that you have leveraged this data in developing your strategic plan.

Please review the grading rubrics carefully. You will see that the most heavily weighted components require you to come up with new insights, present an argument for your proposed changes, and provide authoritative support for your arguments. As a CEO, you must be highly skilled at getting at the right information, avoiding excessive or irrelevant data, and articulating why the data is important and how it shapes your choices and actions.

Your Instructor will review your submission for Part 1 of the Project, and will challenge you, where needed, to dig deeper. It is your responsibility to incorporate that feedback into your presentation.

Part I: Board Preparation Game Plan

Due: Sunday, midnight of Week 7 (12% of Course Grade)

Your Game Plan is a working document that is intended help you organize your findings and make sure you don't forget to address key elements that are critical to the success of your pitch. Additionally, it will serve as a "touchpoint" between you and your instructor. It is an opportunity for you to get feedback that may point out flaws in your logic or missing content that could undermine your presentation if left unaddressed.

Your instructor will review your Game Plan and provide comments and questions where needed to help you strengthen your presentation. Because this is a working document, brief notes, bullets, references to sources are what are needed to ensure you get proper feedback. Your Game Plan must be clear and complete enough that it makes sense, but should not be overly wordy.

Formatting and Submission Requirements

There is no minimum or maximum length, for your Board Presentation Game Plan but you are reminded that, as the CEO, you must identify what really matters. That means you should strive for brevity, favoring bulleted lists, clear headers, and short paragraphs for your deliverables. Your responses are to be concise and logical, and well supported with verifiable sources.

Board Presentation Game Plan

Use the following template as a guide to help you capture and organize the information you will use in your Board Presentation due in Week 10. How you organize your presentation is up to you, but you must be able to address all the following items.

Presentation Component	Key Success Items	Content Summary
<p>1. Executive Summary</p> <p>Draft a Clear Executive Summary (AKA "elevator pitch") for your presentation. A good summary will help focus your audience's attention. Remember, you are telling a business story.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Capture the big idea of what you want to say in no more than 60 seconds <input type="checkbox"/> Frame the problem/opportunity <input type="checkbox"/> State your vision for the organization and the context for your plan <input type="checkbox"/> Outline a high-level snapshot of how your proposed changes will increase the organization's competitive strength 	
<p>2. Data</p> <p>Identify key data relative to the problem or opportunity. You should have most of this from the work you did in JW1 580: <i>Data Analytics</i></p>	<ul style="list-style-type: none"> <input type="checkbox"/> Recap of the data you have gathered and analyzed <input type="checkbox"/> Summarize how you will display and communicate the data. Be specific. <i>"I will use...to support...and display it using..."</i> 	
<p>3. Outline the Plan</p> <p>Craft a clear map of what happens and when.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Key milestones/components <input type="checkbox"/> Include a (proposed) timeline for each milestone/component <input type="checkbox"/> Identify personnel or organizational changes needed to accomplish the plan 	

<p>4. Financials</p> <p>Your initiative is not going to get approved unless you can demonstrate a positive return on investment. In preparing for your Board Presentation, you must address key financial questions.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> How much will implementing the plan cost? <input type="checkbox"/> How will you secure the necessary funds? <input type="checkbox"/> When will this project pay for itself and start making money? <input type="checkbox"/> How much profit will the company earn when you successfully execute the plan? 	
<p>5. Competitive Advantage</p> <p>Your Board will need a clear picture of what your plan will accomplish in strengthening the "competitive moat" surrounding your business.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> How will this initiative put your company ahead of the competition? <input type="checkbox"/> How will it create a long-term sustainable competitive advantage? What will keep our competitors from just copying your moves? 	
<p>6. Risk</p> <p>A Board presentation from the CEO can't be all about the good with none of the bad. Yes, you want to convince the Board that your idea is the right one and you are the one who can make it happen, but you also have a responsibility to educate the Board about the risks relative to the rewards.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> What are the risks (from inside AND outside forces) that could undermine the success of you plan? <input type="checkbox"/> How can you assure the Board that these risks have been adequately assessed and that your plan offers the right balance of risk and reward? 	



RUBRIC: Capstone Project Part 1: Board Presentation Game Plan

CRITERIA	Unsatisfactory	Low Pass	Pass	High Pass	Honors
Executive Summary Weight: 10%	Executive summary was missing or off-topic.	Executive summary covered main points, but was disorganized or overly detailed.	Executive summary provided basic synopsis of the winning move.	Executive summary provided excellent synopsis of the winning move.	Met HP criteria plus displayed an engaging style that indicates a powerful opening that will grab the audience.
Data Weight: 20%	Did not submit an adequate overview or any data analysis.	Submitted incomplete or poorly analyzed data synopsis with no plan for how the data will be used or displayed.	Submitted good but basic data synopsis but included no plan for how the data will be used or displayed.	Submitted an excellent data synopsis and included a well-structured plan for how the data will be used or displayed.	Met HP criteria plus added significant additional insights on both the data and presentation.
Strategic Plan Weight: 20%	Missing, incomplete or unrealistic explanation of the strategic plan.	Strategic plan is identified, but lacks substantive rationale for selection.	Strategic plan is identified and includes basic rationale and information on key actions.	Strategic plan move includes a clear and complete rationale and information on key actions.	Strategic plan is justified by keen insight into market dynamics, competitors' strengths and is a viable solution for both near-term and long-term growth.
Financials Weight: 20%	Performs no financial calculations or makes substantive errors.	Includes minor errors or assumptions which do not materially impact the Strategic Leadership Plan.	Correctly performs all basic financial calculations.	Plus, includes comprehensive calculations that correctly and accurately present the financial health of the organization.	Plus, comprehensive forward-looking calculations of payback relative to IRR and other established metrics.
Competitive Advantage Weight: 20%	Did not identify impact on competitive strength, or presented assertions not supported by data.	Identified potential impact of the winning move on competitive advantage, but did not address sustainability.	Identified potential impact on competitive advantage and provided basic insights into the ability of competitors to match the move.	Clearly explained the sustainability of the move and why competitors will not easily be able to match the move.	Met HP criteria plus offered additional valuable insight into evidence supporting the sustainability of the winning move.
Risk Weight: 10%	Incomplete or unclear synopsis of any of the most important strategic risks.	Risk analysis is superficial demonstrating only a basic understanding of the threats to the proposed plan.	Risk analysis demonstrates basic understanding of risks and the upside opportunity relative to that risk.	Plus, clearly explains rationale for advising this approach.	Plus, explains why plan is superior to other risk-reward options.