



Weekly Agenda

Learn and prepare by:

Reading the following chapters from *Successful Business Plan*:

- ☐ Chapter 18: Preparing, Presenting & Sending Out the Plan

This week you will be graded on the following:

- ☐ Discussion (20 points)
- ☐ Assignment 3 Part 1: Operation, Technology, and Management Plan (70 points)
- ☐ Assignment 3 Part 2: Business Plan – Draft (30 points)

Supplemental (Optional / Not Graded)

- Watch the Lynda.com video titled "[What should you include in a business plan](#)" (4 min 29 s) from the video series *Raising Startup Capital* with Rudolph Rosenberg.

0%

*This checklist is provided as a visual cue of your personal progress, usage and completion of this checklist is not graded.

Mission Possible (20 pts)



Is your business' mission reflected in your business plan?

- Click the link above to get started discussing the topic with your classn
Make sure you respond to at least one (1) other classmate's comments

If you need help with completing discussions please click [here](#) for more informatior

Assignment 3 Part 1: Operation, Technology, and Management Plan (70 points)

For this assignment, you will use the "NAB Company Portfolio" that was downloaded from the Student Center to consider the operations, technology, management, and organization for your company.

Click the link above to see the assignment directions and rubric.

Assignment 3 Part 2: Business Plan – Draft (30 pts)

The past seven weeks, you have worked on different parts of your business plan. It's now time to put the different pieces together into a complete draft.

Click the link above to see the assignment directions and rubric.

WEEK 8**Course Learning Outcome(s)**

- Recommend effective business strategies based on an analysis of domestic and global operating environments, market dynamics, and internal capabilities.
- Analyze strategies for exerting the internal leadership needed to drive the implementation of strategic initiatives and improve operating excellence.

Preparation (Required / Not Graded)

- Reading(s) from *Successful Business Plan*
 - Chapter 18: Preparing, Presenting & Sending Out the Plan
 - Topics: putting your plan to use; a word about confidentiality – nondisclosure agreements; preparing your plan for distribution; layout, design, and presentation; the final steps – editing your plan; preparing an electronic presentation; and updating your plan.

Activities (Required / Graded)

- 1 Assignment 3 Part 1: Operation, Technology, and Management Plan (70 points)
- 2 Assignment 3 Part 2: Business Plan – Draft (30 points)
- 3 Discussion: Mission Possible (20 points)
 - Describe how an organization's mission statement and values are supported by specific aspects in the marketing, operations, technology, management, and social responsibility sections of a business plan.
 - In a real life situation, feedback from your business plan development team can be extremely valuable. Explain the value of receiving feedback from your 'team' (your instructor and fellow students) on the various sections of your non-alcoholic beverage (NAB) business plan while you work towards making necessary revisions.

Supplemental (Optional / Not Graded)

- Watch the Lynda.com video titled "What should you include in a business plan" (4 min 29 s) from the video series *Raising Startup Capital* with Rudolph Rosenberg, located at <http://www.lynda.com/Business-Skills-tutorials/What-should-you-include-business-plan/160363/364096-4.html?org=strayer.edu>.

Assignment 3 Part 1: Operation, Technology, and Management Plan

Due Week 8 and worth 70 points

Use the “NAB Company Portfolio” (see: Course Required Files in Week 1).

Write a three to six (3-6) page paper in which you provide the following information below.

Operations Plan (1 – 2 pages)

Note: Remember to assign a dollar amount to each operational cost you find, as you will need these figures for your income statement and cash flow in Week 8.

1. Create an operations plan for your NAB company using the template in the text as a guide (p. 214 | *Operations Plan Preparation Form*). Extract appropriate information from the NAB Company portfolio, where applicable. Other required items in the template should be filled in using your personal preferences.
2. Provide a rationale for the competitive advantages section using appropriate functional-level and business-level strategies to explain the competitive advantages.
 - **Note:** Much of the research pertaining to the hints provided here can be found in the NAB company portfolio.
 - *Hints:* Consider whether you will rent or buy your facilities or outsource production to an existing company.
 - *Hints:* One of your biggest expenses as a startup non-alcoholic beverage company will be transitioning from a small batch prototype of your beverage to production on a large scale. Research the equipment you will need (vats, refrigerators, burners, ovens, bottling equipment, and so on), whether you will rent or buy, how you will maintain and clean it, and so forth. Consider how you will ensure quality control. What capacity do you intend to reach?
 - *Hints:* Deliberate your inventory control. Where do your supplies come from and what is your turnaround time to produce your beverage once you have received an order?
 - *Hints:* Consider your distribution method. Refer back to your notes for the SWOT analysis assignment in Week 2 of class.
 - *Hints:* How will you stay abreast of new developments in your industry? What new products do you have in development now, in addition to your flagship product?
3. Describe your research and development activities and explain how they will contribute to the company.

Technology Plan (1 – 2 pages)

4. Create a technology plan for your NAB company using the template in the text as a guide (p. 227 | *Technology Plan Preparation Form*). Extract appropriate information from the NAB Company portfolio, where applicable. Other required items in the template should be filled in using your personal preferences.
5. Provide a rationale for the personnel needs section by incorporating appropriate functional-level strategies.
 - *Hints:* Consider the type of technology your company will use to conduct the following activities: manage personnel; take, fulfill, and track orders; manage inventory; communicate with customers and provide customer service; and produce your beverage.

Management & Organization (1 – 2 pages)

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6. Create a management plan for your NAB company using the template in the text as a guide (p. 248 | *Management Plan Preparation Form*). Extract appropriate information from the NAB Company portfolio, where applicable. Other required items in the template should be filled in using your personal preferences.
7. Using the flow charts on p. 242 as a guide, outline your company's management hierarchy.
Note: Charts or diagrams must be imported / included in the MS Word document.
8. Provide a rationale for the management structure and style section by incorporating appropriate functional-level strategies.
9. Format your assignment according to these formatting requirements:
 - a. Cite the resources you have used to complete this exercise. **Note:** There is no minimum requirement for the number of resources used in the exercise.
 - b. Be typed, double spaced, using Times New Roman font (size 12), with one-inch margins on all sides; references must follow APA or school-specific format. Check with your professor for any additional instructions.
 - c. Include a cover page containing the title of the assignment, the student's name, the professor's name, the course title, and the date. The cover page and the reference page are not included in the required page length.

The specific course learning outcomes associated with this assignment are:

- Create a plan to implement a firm's strategy and manage the change from current operations.
- Describe strategic planning techniques used to formulate alternative strategies designed to achieve stated business goals.
- Use technology and information resources to research issues in strategic management.
- Write clearly and concisely about strategic management using proper writing mechanics.

Grading for this assignment will be based on answer quality, logic/organization of the paper, and language and writing skills, using the following rubric.

Points: 70	Assignment 3 Part 1: Operation, Technology, and Management Plan			
Criteria	Unacceptable Below 70% F	Fair 70-79% C	Proficient 80-89% B	Exemplary 90-100% A
1. Create an operations plan for your NAB company using the template in the text as a guide (p. 214 <i>Operations Plan Preparation Form</i>). Extract appropriate information from the NAB Company portfolio, where applicable. Other required items in the template should be filled in using your personal preferences. Weight: 15%	Did not submit or incompletely created an operations plan for your NAB company using the template in the text as a guide.	Partially created an operations plan for your NAB company using the template in the text as a guide.	Satisfactorily created an operations plan for your NAB company using the template in the text as a guide.	Thoroughly created an operations plan for your NAB company using the template in the text as a guide.
2. Provide a rationale for the competitive advantages section using appropriate functional-level and business-level strategies to explain the	Did not submit or incompletely provided a rationale for the competitive advantages section using appropriate	Partially provided a rationale for the competitive advantages section using appropriate functional-level and	Satisfactorily provided a rationale for the competitive advantages section using appropriate functional-level and	Thoroughly provided a rationale for the competitive advantages section using appropriate functional-level and

competitive advantages. Weight: 5%	functional-level and business-level strategies to explain the competitive advantages.	business-level strategies to explain the competitive advantages.	business-level strategies to explain the competitive advantages.	business-level strategies to explain the competitive advantages.
3. Describe your research and development activities and explain how they will contribute to the company. Weight: 10%	Did not submit or incompletely described your research and development activities and did not submit or incompletely explained how they will contribute to the company.	Partially described your research and development activities and partially explained how they will contribute to the company.	Satisfactorily described your research and development activities and satisfactorily explained how they will contribute to the company.	Thoroughly described your research and development activities and thoroughly explained how they will contribute to the company.
4. Create a technology plan for your NAB company using the template in the text as a guide (p. 227 Technology Plan Preparation Form). Extract appropriate information from the NAB Company portfolio, where applicable. Other required items in the template should be filled in using your personal preferences. Weight: 15%	Did not submit or incompletely created a technology plan for your NAB company using the template in the text as a guide.	Partially created a technology plan for your NAB company using the template in the text as a guide.	Satisfactorily created a technology plan for your NAB company using the template in the text as a guide.	Thoroughly created a technology plan for your NAB company using the template in the text as a guide.
5. Provide a rationale for the personnel needs section by incorporating appropriate functional-level strategies. Weight: 5%	Did not submit or incompletely provided a rationale for the personnel needs section by incorporating appropriate functional-level strategies.	Partially provided a rationale for the personnel needs section by incorporating appropriate functional-level strategies.	Satisfactorily provided a rationale for the personnel needs section by incorporating appropriate functional-level strategies.	Thoroughly provided a rationale for the personnel needs section by incorporating appropriate functional-level strategies.
6. Create a management plan for your NAB company using the template in the text as a guide (p. 248 Management Plan Preparation Form). Extract appropriate information from the NAB Company portfolio, where applicable. Other required items in the template should be filled in using your personal preferences. Form). Weight: 15%	Did not submit or incompletely created a management plan for your NAB company using the template in the text as a guide.	Partially created a management plan for your NAB company using the template in the text as a guide.	Satisfactorily created a management plan for your NAB company using the template in the text as a guide.	Thoroughly created a management plan for your NAB company using the template in the text as a guide.
7. Using the flow charts on p. 242 as a guide, outline your company's management hierarchy.	Did not submit or incompletely outlined your company's	Partially outlined your company's management hierarchy, using the	Satisfactorily outlined your company's management	Thoroughly outlined your company's management hierarchy, using the

Note: Charts or diagrams must be imported / included in the MS Word document. Weight: 15%	management hierarchy, using the flow charts on p. 242 as a guide.	flow charts on p. 242 as a guide.	hierarchy, using the flow charts on p. 242 as a guide.	flow charts on p. 242 as a guide.
8. Provide a rationale for the management structure and style section by incorporating appropriate functional-level strategies. Weight: 5%	Did not submit or incompletely provided a rationale for the management structure and style section by incorporating appropriate functional-level strategies.	Partially provided a rationale for the management structure and style section by incorporating appropriate functional-level strategies.	Satisfactorily provided a rationale for the management structure and style section by incorporating appropriate functional-level strategies.	Thoroughly provided a rationale for the management structure and style section by incorporating appropriate functional-level strategies.
9. Clarity, writing mechanics, and formatting requirements Weight: 15%	More than 6 errors present	5-6 errors present	3-4 errors present	0-2 errors present

Operations Plan Preparation Form

page
214

On this form record specific information relating to your company's operational processes.

Key Aspects of Operations (possibilities include facilities, production process, equipment, labor force utilization): _____

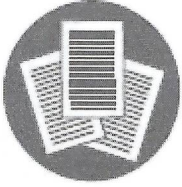
Cost and Time Efficiencies: _____

Competitive Advantages: _____

Problems Addressed and Overcome: _____

Use this information as the basis of your plan's Operations section.

Technology Plan Preparation Form



Page 22

Using this form as a guide, summarize the key technology concerns and technology needs of your business, which you can then include in your business plan, either in a separate Technology section, or in the Operations section.

Software Needs (specify on-premise and "in the cloud"): _____

Hardware Needs: _____

Telecommunications Needs: _____

Personnel Needs (specify in-house or outsourced): _____

Use this information as the basis of your plan's Technology section.

Management Plan Preparation Form



Page 218

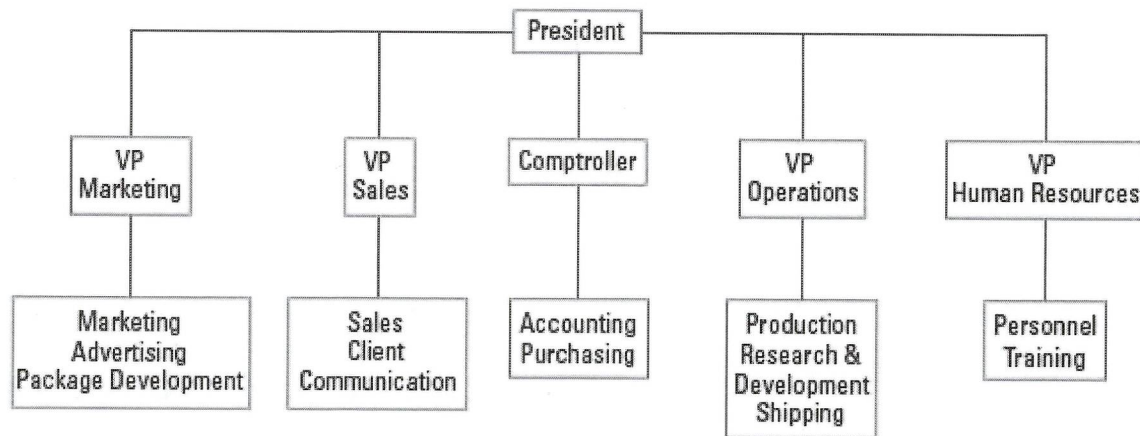
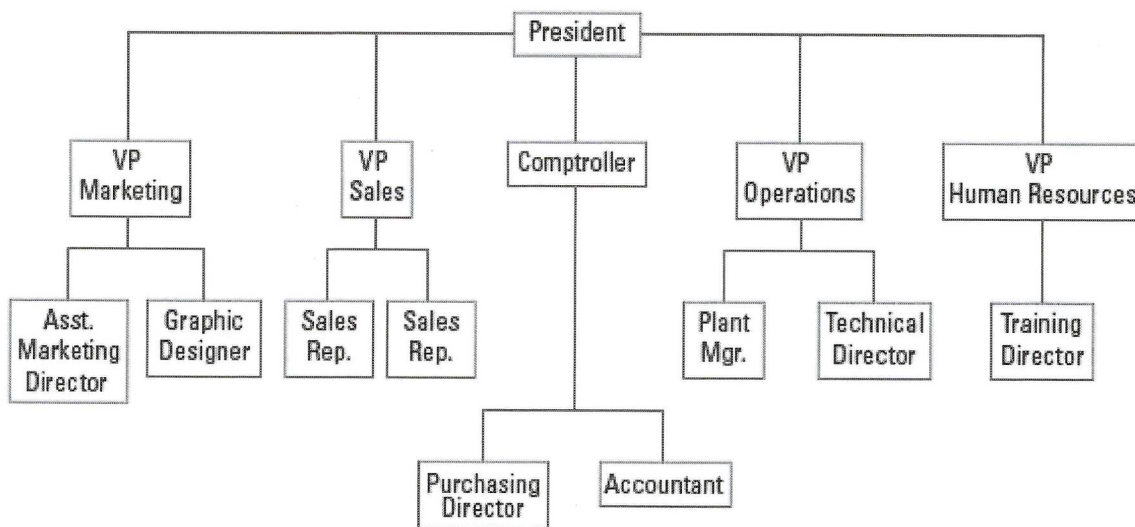
List the key members of your management team, with a brief description of each person's relevant business background, responsibilities they have in your company, and the compensation they receive.

Key Management and Employees: _____

Board Members and Advisors: _____

Management Structure and Style: _____

Use this information as the basis of your plan's Management section.

EXAMPLE: FLOW CHARTS*Page 242***AREAS OF RESPONSIBILITY****REPORTING RELATIONSHIPS**

Assignment 3 Part 2: Business Plan – Draft

Due Week 8 and worth 30 points

This assignment consists of two (2) sections: a draft of your business plan and an income statement containing your business plan financials (i.e., Week 7 Discussion “The Financials”). **Note:** You must submit both sections as separate files for the completion of this assignment.

You must intend to raise money for your startup company. You can start with money from friends and family but at some point you will need funds from outside investors, either angels or venture capitalists, depending on how much money you project you will need to raise. Another possible angle is to develop money through crowdfunding, assuming your product meets the demand of such audiences.

Before you can raise money, you must develop a business plan that convinces an investor that your company will succeed.

Section 1: Business Plan – Draft (MS Word or equivalent)

Read Chapters 18 and 19 of the course text: *Successful Business Plan*. Use the Plan Preparation Forms at the end of each chapter of *Successful Business Plan* as a rough guide.

Write an approximately fifteen to twenty (15-20) page draft of your business plan in which you:

1. Revise the components of the following previously submitted sections based on the feedback you have received.
 - a. Company Description (*Assignment 1*)
 - b. Industry Analysis and Trends (*Assignment 1*)
 - c. Strategic Position & Risk Assessment (*Assignment 1*)
 - d. Target Market (*Assignment 2*)
 - e. Competition (*Assignment 2*)
 - f. Marketing Plan & Sales Strategy (*Assignment 2*)

2. Create an Ethics & Social Responsibility Plan.

Note: The Ethics & Social Responsibility plan should account for approximately three to five (3-5) pages of the Business Plan Draft.

- a. Describe the ways in which your company is committed to being a good corporate citizen.
 - *Hints:* Consider the following areas:
 - Creating jobs
 - Following the laws of every jurisdiction in which your company operates
 - Fair and honest treatment of employees
 - Non-discrimination of employees and increasing diversity of your work force
 - *Hints:* If your company is designed as a social venture—in which you have a primary purpose of achieving a social or environmental goal—describe what that goal is and what aspects of your company are designed to reach that goal. Provide a rationale for why you have or why you have not chosen this to be a social venture.
- b. Discuss how your company’s activities will affect the environment and identify the steps you will take to mitigate any negative impacts.
 - *Hints:* As a beverage company, consider such issues as your choice of packaging, disposal of bottles / packages by consumers, and your use of resources, such as water in areas where water may be scarce.

- c. Determine any health issues / claims related to the product you are making, whether negative or positive. Suggest the strategy your company will use to mitigate any negative issues, and to ensure any positive claims are true.
 - d. Many beverage products have negative health impacts on certain segments of a population (e.g., children, pregnant mothers, etc.). Suggest your company's plan, through advertising, distribution, and / or other methods, to target and reach only appropriate market segments.
3. Format your assignment according to these formatting requirements:
 - a. Cite the resources you have used to complete the exercise. **Note:** There is no minimum requirement for the number of resources used in the exercise.
 - b. Be typed, double spaced, using Times New Roman font (size 12), with one-inch margins on all sides; references must follow APA or school-specific format. Check with your professor for any additional instructions.
 - c. Include a cover page containing the title of the assignment, the student's name, the professor's name, the course title, and the date. The cover page and the reference page are not included in the required page length.

Section 2: Business Plan Financials (MS Excel worksheets template)

4. For year one, revise and submit the Income Statement, Cash Flow Projections, and Balance Sheet sections from the "Business Plan Financials" MS Excel template (see: Course Required Files in Week 1).

The specific course learning outcomes associated with this assignment are:

- Describe strategic planning techniques used to formulate alternative strategies designed to achieve stated business goals.
- Create a plan to implement a firm's strategy and manage the change from current operations.
- Analyze strategies for exerting the internal leadership needed to drive the implementation of strategic initiatives and improve operating excellence.
- Use technology and information resources to research issues in strategic management.
- Write clearly and concisely about strategic management using proper writing mechanics.

Grading for this assignment will be based on answer quality, logic/organization of the paper, and language and writing skills, using the following rubric.

Points: 30	Assignment 3 Part 2: Business Plan – Draft			
Criteria	Unacceptable Below 70% F	Fair 70-79% C	Proficient 80-89% B	Exemplary 90-100% A
1a. Revise the Company Description section based on the feedback you have received. Weight: 7%	Did not submit or incompletely revised the Company Description section based on the feedback you have received.	Partially revised the Company Description section based on the feedback you have received.	Satisfactorily revised the Company Description section based on the feedback you have received.	Thoroughly revised the Company Description section based on the feedback you have received..
1b. Revise the Industry Analysis and Trends section based on the feedback you have received. Weight: 7%	Did not submit or incompletely revised the Industry Analysis and Trends section based on the	Partially revised the Industry Analysis and Trends section based on the feedback you have received.	Satisfactorily revised the Industry Analysis and Trends section based on the feedback you have	Thoroughly revised the Industry Analysis and Trends section based on the feedback you have

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	feedback you have received.		received.	received.
1c. Revise the Strategic Position & Risk Assessment section based on the feedback you have received. Weight: 7%	Did not submit or incompletely revised the Strategic Position & Risk Assessment section based on the feedback you have received.	Partially revised the Strategic Position & Risk Assessment section based on the feedback you have received.	Satisfactorily revised the Strategic Position & Risk Assessment section based on the feedback you have received.	Thoroughly revised the Strategic Position & Risk Assessment section based on the feedback you have received.
1d. Revise the Target Market section based on the feedback you have received. Weight: 7%	Did not submit or incompletely revised the Target Market section based on the feedback you have received.	Partially revised the Target Market section based on the feedback you have received.	Satisfactorily revised the Target Market section based on the feedback you have received.	Thoroughly revised the Target Market section based on the feedback you have received.
1e. Revise the Competition section based on the feedback you have received. Weight: 7%	Did not submit or incompletely revised the Competition section based on the feedback you have received.	Partially revised the Competition section based on the feedback you have received.	Satisfactorily revised the Competition section based on the feedback you have received.	Thoroughly revised the Competition section based on the feedback you have received.
1f. Revise the Marketing Plan & Sales Strategy section based on the feedback you have received. Weight: 7%	Did not submit or incompletely revised the Marketing Plan & Sales Strategy section based on the feedback you have received.	Partially revised the Marketing Plan & Sales Strategy section based on the feedback you have received.	Satisfactorily revised the Marketing Plan & Sales Strategy section based on the feedback you have received.	Thoroughly revised the Marketing Plan & Sales Strategy section based on the feedback you have received.
2a. Describe the ways in which your company is committed to being a good corporate citizen. Weight: 7%	Did not submit or incompletely described the ways in which your company is committed to being a good corporate citizen.	Partially described the ways in which your company is committed to being a good corporate citizen.	Satisfactorily described the ways in which your company is committed to being a good corporate citizen.	Thoroughly described the ways in which your company is committed to being a good corporate citizen.
2b. Discuss how your company's activities will affect the environment and identify the steps you will take to mitigate any negative impacts. Weight: 7%	Did not submit or incompletely discussed how your company's activities will affect the environment and did not submit or incompletely identified the steps you will take to mitigate any negative impacts.	Partially discussed how your company's activities will affect the environment and did not submit or incompletely identified the steps you will take to mitigate any negative impacts.	Satisfactorily discussed how your company's activities will affect the environment and did not submit or incompletely identified the steps you will take to mitigate any negative impacts.	Thoroughly discussed how your company's activities will affect the environment and did not submit or incompletely identified the steps you will take to mitigate any negative impacts.
2c. Determine any health issues / claims related to the product you are making, whether negative or positive. Suggest the strategy your company will use to mitigate any negative issues, and to ensure	Did not submit or incompletely determined any health issues / claims related to the product you are making, whether negative or positive. Did not submit or	Partially determined any health issues / claims related to the product you are making, whether negative or positive. Partially suggested the strategy your company will use to	Satisfactorily determined any health issues / claims related to the product you are making, whether negative or positive. Satisfactorily suggested the	Thoroughly determined any health issues / claims related to the product you are making, whether negative or positive. Thoroughly suggested the

any positive claims are true. Weight: 7%	incompletely suggested the strategy your company will use to mitigate any negative issues, and to ensure any positive claims are true.	mitigate any negative issues, and to ensure any positive claims are true.	strategy your company will use to mitigate any negative issues, and to ensure any positive claims are true.	strategy your company will use to mitigate any negative issues, and to ensure any positive claims are true.
2d. Suggest your company's plan, through advertising, distribution, and / or other methods, to target and reach only appropriate market segments. Weight: 7%	Did not submit or incompletely suggested your company's plan, through advertising, distribution, and / or other methods, to target and reach only appropriate market segments.	Partially suggested your company's plan, through advertising, distribution, and / or other methods, to target and reach only appropriate market segments..	Satisfactorily suggested your company's plan, through advertising, distribution, and / or other methods, to target and reach only appropriate market segments.	Thoroughly suggested your company's plan, through advertising, distribution, and / or other methods, to target and reach only appropriate market segments.
3. Clarity, writing mechanics, and formatting requirements Weight: 15%	More than 6 errors present	5-6 errors present	3-4 errors present	0-2 errors present
4. For year one, revise and submit the Income Statement, Cash Flow Projections, and Balance Sheet sections from the "Business Plan Financials" MS Excel template (see: Course Required Files in Week 1). Weight: 15%	Did not submit or incompletely, for year one, revised and submitted the Income Statement, Cash Flow Projections, and Balance Sheet sections from the "Business Plan Financials" MS Excel template (see: Course Required Files in Week 1).	Partially, for year one, revised and submitted the Income Statement, Cash Flow Projections, and Balance Sheet sections from the "Business Plan Financials" MS Excel template (see: Course Required Files in Week 1).	Satisfactorily, for year one, revised and submitted the Income Statement, Cash Flow Projections, and Balance Sheet sections from the "Business Plan Financials" MS Excel template (see: Course Required Files in Week 1).	Thoroughly, for year one, revised and submitted the Income Statement, Cash Flow Projections, and Balance Sheet sections from the "Business Plan Financials" MS Excel template (see: Course Required Files in Week 1).