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**Rowe School of Business
 Commerce Student Strategy Project**

COMM 4351/4352 Strategy Capstone Project Submission

Proposals will focus on organizational issues that have significant performance implications that are difficult to reverse after implementation, including:

- Addressing a major organizational threat or opportunity
- Analyzing the industry/environment and changing or re-designing the organization (e.g., restructuring to expand to a new market or provide new products/services)
- Redesigning organizational rewards, organizational processes or incentive systems
- Making changes to organizational culture or strategic leadership

Organization Requirements	<ul style="list-style-type: none"> • Preferably in Nova Scotia (exceptions for co-op placements or special projects may be permitted) • May be a for-profit, not-for-profit, public/government agency or a new venture • Must be complex enough to allow for external, internal, and strategic analysis • Must have a minimum of 10 employees
Deliverables	<p>December</p> <ul style="list-style-type: none"> • Presentation • 15-page report (external and industry analyses including: business, corporate and functional strategies, Porter’s Five Forces, SWOT, VRIO) <p>April</p> <ul style="list-style-type: none"> • Presentation • 20-page report (internal organizational analyses including: people, processes, incentives/rewards, culture, structure)

PLEASE COMPLETE ALL SECTIONS OF THIS FORM.

1. ORGANIZATION INFORMATION

Organization name		
Organization website		
Type of organization		<i>Example: For-profit company, non-profit</i>
Number of employees		<i>Example: 15 full-time employees, 10 part-time employees</i>
Mission / Vision (if applicable)		<i>Example: Mission: To make electricity more acceptable, more available, and more affordable to more people in more situations than the day before, resulting in greater value for the shareholder.</i>
Strategic Goals or Objectives (if applicable)		<i>Example: Build on institutional capacities; take our place nationally and internationally; catalyze the intellectual, social and economic development of our communities.</i>

2. ORGANIZATION CONTACTS

Employee	Name	Mailing Address	Phone Number	Email
Senior manager / owner				
Advisor 1*				
Advisor 2*				

* Student advisors may also be third party service providers such as accounting firms, legal firms or HR firms.

3. STRATEGY CAPSTONE PROJECT DESCRIPTION

Purpose and goals of the strategy capstone project		<p><i>Example 1: Analyze how the firm is internally structured and recommend the best structure to prepare for growth. Conduct an overview of existing regional competition to our business and determine differentiating factors.</i></p> <p><i>Example 2: Analyze how the non-profit is responding to the changing demographics of Nova Scotia and assess the impact both on fundraising and community impact work. Assess the risks and opportunities and offer recommendations for the next 5-years.</i></p> <p><i>Example 3: Company X is an upstart boutique accounting firm offering bookkeeping through to CFO-for-Hire services to small and mid-sized clients across Canada. The firm is looking to grow regionally, then</i></p>
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		<p><i>expand to strategic markets across the country. The firm is looking for assistance with:</i></p> <ol style="list-style-type: none"> <i>1. Recommendations to improve how the firm is internally structured and best structure to prepare for growth and</i> <i>2. An overview of existing regional competition, and</i> <i>3. Assistance determining their differentiating factors.</i>
Organization's current strategy		<p><i>Example 1: The firm is currently in growth mode and attempting to attract customers through direct contact and through referral relationships.</i></p> <p><i>Example 2: The organization's current strategy is to change 50,000 lives in 5 years through research, well-developed strategy, community investment, partnerships that bring the city together, evaluations and advocacy.</i></p>

4. DATA & INFORMATION

Students will sign a confidentiality form prior to starting the strategy capstone project (see the Appendix).

- a) Please list the **financial** information requirements for the strategy project and identify how the company will provide this information to students.

Financial information requirements		<p><i>Example 1: The company will provide revenue, time and effort information on existing classes of clients and on different types of services performed. Some financial analysis will be required in determining growth targets, number of clients required to meet targets and estimated incremental investment and profitability in reaching these targets.</i></p>
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		<i>Example 2: The organization will provide a budget and projections.</i>
How will financial information be provided to the two group?		<p><i>Example 1: Financial information will be provided by email, on paper or during in-person meetings depending on the confidential nature of the information. The information will be emailed to all members of both groups.</i></p> <p><i>Example 2: The information will be placed on a secure server that groups can access. Each individual student must sign a confidentiality agreement with the company before they can view and access the financial information with their provided username and password.</i></p>

b) If applicable, please identify **other** information requirements for the strategy project from different departments (i.e. marketing, operations, legal). If not, please leave this blank.

Are there any other information requirements		<i>Example: The company may share copies of community funding contracts with the student group as well as lists of volunteers, including the Board of Directors.</i>
How will other information be provided to students?		<i>Example: Information may be provided by email or during in-person meetings depending on the confidential nature of the information. Some information may also be shared through a password protected USB drive.</i>

c) Does the strategy project require the collection of data such as interviews or a survey?

- Yes
- No

d) If yes, please list the type of data collection that will be undertaken:

All formal interviews, surveys, etc. conducted by Dalhousie students must have ethics approval. It can take up to 2 months to receive approval (the form is available at: <https://www.dal.ca/faculty/management/current-students/research-ethics-forms.html>).

5. INFORMATION SHARING

Outline how the two groups will share information received from the company		<p><i>Example 1: The two groups will share all information received and meet together with the company throughout the 8-month project.</i></p> <p><i>Example 2: A designated student (<u>name</u>) will receive all information from the company and be responsible for disseminating it to all members of both groups. Given their busy schedules, each group will arrange meetings separately with the organization.</i></p>
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6. LOGISTICS & EXPENSES

a) Will the organization cover out-of-pocket strategy project costs such as *long-distance calls, photocopying, travel costs (if outside the Halifax Metro Transit System)*?

- Yes
- No

b) If yes, which costs will the organization cover?

c) Will students need to travel outside the Halifax Metro Transit System to complete the strategy project?

Yes

No

The final, approved proposal must be signed by both the students and at least one member of the organization.

Student Name (Print)

Student Signature

Name (Print) – On behalf of the organization

Signature

On behalf of the organization, I/we agree to share financial and other information as stated in this proposal.



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 Project Submission Form**

CONFIDENTIALITY AGREEMENT

IN CONSIDERATION of my being permitted to participate in a project for the providing of advice and assistance to: ORGANIZATION NAME and in cooperation with Dalhousie University and in fulfilment of the course requirements for COMM 4351/4352 and thus receiving the increased educational experience from my said participation, I agree as follows:

1. I agree that I will treat in strict and absolute confidence all information received by me from the above stated company or any member of the company requesting assistance of the kind provided under this project. The only exception to this commitment will be other members of my team or the supervising professor of Dalhousie University.
2. I agree that all information received from the company will be used for educational purposes with the objective of preparing a report and recommendations for the stated company. The report and any information will not be used by myself or any team member for any other purpose without the prior written consent of the stated company.
3. I agree that I will not recommend to the stated company the purchase of goods or services in which I or another member of the team may have an interest, unless there is full disclosure of that interest, nor will I accept fees, commissions, gratuities or other benefits from any firm or individual that I or another member of the team may recommend to the company.

I am aware that any violation of these commitments is a serious offence and will result in course failure and possible dismissal from the business school. I also realize that I may be personally liable in any legal action brought by the stated company

Student Name (Print)

Student Signature

Date: _____