

Doing Case Analysis as a Team

The purpose of this exercise is to provide you with practice on how to prepare, present and write up the cases you will be doing in this class. For the purpose of this exercise we will assume that your team has been assigned to read, prepare answers, make a formal presentation and write a report on the “July at the Multiplex” case on page 231 of the text. Parts 1-4 below are due the “coaching” day for the case; parts 5-6 are due during the “presentation” day (see the course calendar).

1. Prepare a work plan for how your team will accomplish requirements 2-6 listed below. Bring this work plan to class. You may use the Sample Team Workplan as a model.
2. Read the case and prepare a summary of the main facts in the case. You can use a simple bullet outline or numbered outline to organize your facts. The idea is to have the key facts at your fingertips so you can know what facts are available and so you can recall them quickly during a discussion. For example, below are three facts from the case.
 - Royal Theater owns a 16-theater complex in the Eastfield Mall.
 - Twenty minutes of commercials were shown before the movie began.
 - The owner of Royal Theater, Mull T. Plex, forms a consortium with his competitors.
3. List the key issues or requirements in this case? A good place to start is at the “Required” section at the end of the case. Using this as a start, you can identify additional problems or issues you need to address.
4. Bring to class a list of help needed questions that will allow you to develop the answers to the questions or requirements in this case. For example, there may be a contract issue in the case. You may not know exactly what a legal “contract” is. If so, come to the class with a list of such questions. Some sample questions:
 - I do not understand what the term “consortium” means?
 - What is a sample? How is it evaluated?

***NOTE:** The coaching or help session will not address questions pertaining to core concepts from the lower division core. You have previously studied these concepts. Also, do not ask questions about facts that are missing in the case. The instructor does not know any more than what is given in the case and he or she cannot make up facts that the case writer did not provide.*
5. Prepare a short answer to the case as a PowerPoint presentation. Use the Presentation and Power Point guides in your course pack. You will not have to give a presentation; you only need to bring a printout of your slides to class.
6. Prepare a written answer using word processing software to this case using a report format. Assume that you have been hired as consultants by Mr. Plex. Use the Written Communication material on page 115 of this course pack as a as a writing guide.

Sample Work Plan for Week of 9/23-10/1

Team Members: Raquel Albelda James Movido
 Kelly Baker Gavin Rubin
 Shota Emyan

Assigned Tasks	Responsible Associate	Expected Output	Start Date	End Date	Status
Read Roadrunner Case	Team	- Have an understanding of the case for “help questions” session during class.	9/21/02	9/23/02	Done
Create list of key facts& issues	Gavin	- Document and distribute to team.	9/23/02	9/23/02	Done
Feedback in list of key issues	Team	- Give Gavin feedback on list of key fact & issues	9/23/02	9/23/02	Done
Team meeting on homework assignments for Roadrunner	Team	- The team will come to agreement on who will address each question.	9/24/02	9/28/02	Done
Question #1	Team	- Document answer			Done
Question #2	Kelly	- Document answer			Pending
Question #3	Gavin	- Document answer			Pending
Question #4	Shota	- Document answer			Pending
Question #5	James	- Document answer			Pending
Question #6	Raquel	- Document answer			Pending
Question #7	Team	- Document answer: this will be answered the e-mail or message board			Pending
Send in documented answers	Team	E-mail documented answers to James	9/28/02	9/28/02	Pending
Converge all separate documents into first draft document	James	Create one document in memo format containing all answers	9/28/02	9/28/02	Pending
Send first draft	James	E-mail first draft to the team	9/28/02	9/28/02	Pending
Review first draft document	Team	Review first draft document, and send change suggestions to James via e-mail. (Please CC team on change suggestions to keep everyone informed).	9/28/02	9/29/02	Pending
Make changes for final draft	James	- Update first draft document with change suggestions - Redistribute final draft	9/29/02	9/29/02	Pending
Review final draft	Team Team James	- Review the final draft - E-mail additional suggestions to James - If necessary, make any additional changes and e-mail another draft	9/29/02	9/30/02	Pending
Print final draft	Team	Print and bring to class the final document	10/1/02	10/1/02	Pending

TEAM WORK PLANS: EVALUATION CRITERIA

A good work plan that is clearly communicated and shared by all team members is essential for effective teamwork. Here are the criteria by which your work plan will be evaluated.

- **Comprehensive**. The plan covers all necessary activities to produce a high quality output on time.
- **Actionable**. All activities are defined using a verb-noun combination (do library research; write first draft of report; and so on) so the action to be taken is clear.
- **Measurable Outputs**. The output or "deliverable" from each activity is clearly defined and is measurable. (For example, the output of library research may be a written summary to be shared with the team or simply an oral report to bring everyone up to date on the results of an activity).
- **Realistic Deadlines**. All deadlines are achievable and support the final project deadline.
- **Accountability**. The plan clearly assigns responsibility for activities to be performed and everyone knows who is responsible for what.
- **Fairness**. The assignments are fairly distributed to all team members so no one person has to carry a heavier burden.
- **Leverages Strengths**. The distribution of activities leverages the strengths of individual team members.
- **Support**. There is a plan to help and support team members who are struggling with their part of the assignment.
- **Contingencies**. There is a contingency plan for things that might go wrong.

Gateway Team Evaluation Form

(This is a fill-able document. Type in each field, then save adding “.last name” and submit according to your faculty instructions.)

Your Name :

Class Day/Time:

Team #/Name:

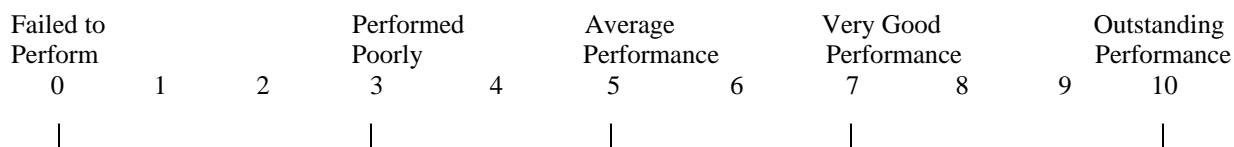
Instruction

You are asked to evaluate the contribution that each of your team members have made to ***this assignment***. The objective is to provide timely evaluation confidentially to your instructor. (Your team members will not see this form.) Please be candid and helpful in your evaluation.

Title of the assignment:

Rating scale

Please use the following 0-10 scale to evaluate each team member in each area. These numbers do not correspond to a grade. The maximum total points possible are 100 (10 points for each area). Scores below 4 or above 8 should be explained in the comments section.



Areas	Names	First Name:	First Name:	First Name:	First Name:
Attended or participated in all team activities (via email, chat, phone, etc.)					
Came prepared for team meetings and communicated ideas effectively					
Completed tasks on time and to specification					
Improved the final product by offering insightful comments					
Gave timely and honest feedback					
Encouraged innovation among teammates					
Shared essential information with teammates					
Listened to others and showed respect for different viewpoints					
Supported and followed team processes and rules					
Was energetic, enthusiastic and creative					
TOTAL SCORE OUT OF 100					

Additional Comments. *Use the comments section of this form to provide specific comments about team members or a specific member. (Remember to balance your comments -- say positive things as well as behaviors you would like to see changed). Please provide rationale for especially high or low scores. Your comments are confidential.*

Explanatory Comments

SUGGESTIONS FOR MAKING EFFECTIVE PRESENTATIONS

Audience: In this class, you are to assume that your team has done this assignment to solve a problem facing your organization, and you are presenting the results of your analysis to your peers. Your job is to explain your analysis, conclusions, recommendations, and field questions. Each team member must have a **substantive** role in the presentation.

Form and Length: While there are many forms of communication, this class will focus primarily on learning how to do formal presentations using PowerPoint slides. You are free to *supplement* your formal presentation with other interactive audience involvement techniques. In general, most people retain only a small part of what they hear so keep the formal part of the presentation to **no more than 20-25 minutes**.

General Rules. Here are some general rules you should follow for all forms of presentations.

- Introduce yourself and your group before starting. Try and connect with the audience in some way to make them and yourself at ease.
- Set ground rules about how you want to handle questions – that is, throughout the presentation, at the end of the presentation or clarification only during presentation and substantive questions at the end.
- Outline the presentation so the audience knows what to expect. Refer to the agenda throughout the presentation so the audience knows where you are going.
- Start by presenting the basic facts so everyone is on the same page. Do not assume that everyone has the same level of familiarity with the problem as you do.
- Master the use of non-verbal cues such as eye contact, hand gestures, voice inflection (loud, clear and slow), and timing to keep the audience with you every step of the way.
- Think of ways to involve the audience so the presentation is interactive rather than one-way. (Some possible ways, ask questions, invite comments, take a show of hands, etc.)
- Make sure that all your points are on the PowerPoint slides. Do not talk to a blank screen.
- Keep your bullet points short, clear and easy to read. (No more than 4-5 bullets per slide). Do not use long sentences.
- Do not read complicated process descriptions or tables of data. Highlight the main points or give the audience a minute to read for themselves.
- Organize your thoughts and use the bullet points on the slides as your cues for recall. **Do not read from extensive notes!**
- Reduce stress, control fear, combat stage fright, relax and feel comfortable before the audience.
- Project your voice and effectively use pauses to dramatize your point. Avoid "ums" and filler words such as "you know" and "like".
- Do not put your hands in your pockets or move around excessively or be tied to a podium. Move in a relaxed way. Do not cover your slides or stand in front of the projector or screen.
- Answer questions directly and do not be defensive. Rephrase the question if you are unclear about it.

PRESENTATION EVALUATION FORM

Name: _____ **Team #:** _____

Put Presenters' Names Here

Case Name: _____ Presenting Team: _____		1	2	3	4	5
Evaluation Criteria	Total Points					
<u>Introduction</u> <ul style="list-style-type: none"> • Introduced group/self • Outlined presentation • Set ground rules before starting • Made effort to connect with audience 	10					
<u>Platform skills</u> <ul style="list-style-type: none"> • Was relaxed and comfortable • Not tied to podium • Projected voice and spoke clearly • Used pauses to underscore points • Did not use filler words • Made good use of <u>non-verbal</u> cues (eye contact, gestures, voice inflection) • Kept audience involved, checked for understanding 	30					
<u>Visual aids: (Team Grade same for all)</u> <ul style="list-style-type: none"> • All major points covered are on overhead • Appropriate for nature of presentation • Content crisp, brief & uncluttered • Readable font size/colors (No eye charts) 	20					
<u>Communication</u> <ul style="list-style-type: none"> • Did not read from a script or notes • Provided clear explanation of materials • Explained flow charts and data tables • Presentation was well organized 	30					
<u>Handling of Q&A</u> <ul style="list-style-type: none"> • Listened to questions carefully • Responded directly to question asked • Answered questions without defensiveness 	10					
<p align="center">TOTAL</p> <p>*Grade each presenter out of 100</p>	100					

Role of the Challenge Team

The role of the challenge team is to act as a second set of analysts or consultants who have been brought in to analyze the case and offer suggestions. It is an expert "second opinion" -- much like consulting another doctor to see if they both agree on the diagnosis. The challenge team should understand the presenting team's analysis and also come up with their answers. The idea is to enhance and extend the conversation rather than to criticize.

When you agree with a presenting team's analysis, you do not need to nit pick and find something to criticize. The best thing is to affirm your agreement and then extend the conversation to cover other aspects of the issues that the presenting team may not have addressed. For example, the team members could share their personal experiences from work or consider the application of the type of analysis in the case to their work environment.

Obviously, when the challenge team has approached an issue differently, they have an opportunity to explore these differences so the rest of the class can appreciate the alternative ways of analyzing a case. In exploring differences, try to enhance the understanding of the class about why it is possible for two teams to look at the same issue in various ways. While you are not trying to score debating points, you must argue persuasively for your view while keeping an open mind to the presenting team's viewpoint.

Each member of the challenge team will have approximately 2-3 minutes to comment on the presentation. **Address your comments/questions to specific presenters. Give every presenter an opportunity to respond to questions.** You will be graded on five criteria (see the Challenge Team grading form). A good challenge usually has the following five elements, although occasionally some may not apply.

- 1) **Commendation.** Start on a positive note by saying one or two things that you liked about the presentation. Say something you believe in so it does not sound condescending or artificial.
- 2) **Agreements.** State the areas of the presentation that you **agree** with. For example, assume a presentation covers three areas. You might say that you agree with the analysis and conclusions on issues 1 and 3 and do not have much to add. You may want to explore or push further in these areas if you wish. Agreements help to take issues that are straight forward off the table.
- 3) **Clarification.** If you did not follow any part of the presentation (numbers, comments, analysis or conclusions), seek clarification. Ask the presenters to go back to the slide you are inquiring about. For example, "Can you please explain the computation of the expected value in slide 5?" In particular, seek clarification for all areas in which you might have differences. Try to determine if the areas are still unclear or if differences of opinion exist.
- 4) **Differences.** Where you have differences, start with an inquiry. For example, "Am I correct that you concluded that interest rates do not affect stock market returns?" Avoid statements that will elicit defensive answers. For example, "You ignored all of the case law on negligence." State it as: "We used previous court cases to decide the negligence issue. Was this inappropriate?" Let the presenters respond before moving to the next difference.
- 5) **Extensions.** If you have done more analysis than covered by the presentation or uncovered interesting issues, you can close by extending the presentation. (*This may not apply to all presentations*).

INSTRUCTOR'S Challenge Team Grading Form

Case: _____ Date: _____ Challenge Team: _____

Member	Total Points					
Criteria						
Commendation - started with compliment	Y/N					
Agreements - stated point(s) of agreement	Y/N					
Clarification - asked for additional information	Y/N					
Differences - stated point(s) of disagreement and asked for response	Y/N					
Extensions - added information to presentation	Y/N					
Member Preparation Team member addressed at least 2 areas above, using appropriate time	80					
Team Coordination* Team adequately addressed at least 3 areas above <small>* All team members get the same grade</small>	20					
TOTAL	100					