Southern New Hampshire University

# FIN 330 Final Project I Milestone One Guidelines and Rubric

**Overview:** Corporate financial managers must have a business-wide perspective to successfully navigate the corporate environment. The skills you develop in this course will support you in your future business career as well as set the foundation for the concepts that will be covered in the next course, FIN 336: Multinational Corporate Finance. Your final projects for FIN 330 will allow you to showcase your mastery of the varied skills a finance professional must obtain by requiring you to analyze a real-world corporation from a quantitative perspective while also investigating the challenges and decisions a manager must face.

As such, your assessment will be broken up into two separate but related final projects. The first project, a corporate valuation report, will focus on a U. S. corporation of your choice. You will analyze the historical financials of your chosen corporation, using the provided Excel template, and estimate the value of your corporation in a brief report.

The second project is a risk management and ethical analysis report, which will focus on the same corporation, highlighting the management and leadership considerations and decisions required of top-level financial managers. In this written report, you will discuss ethics, corporate social responsibility, and challenges related to attaining short-term and long-term goals.

Combined, these two projects will assess your learning regarding the quantitative and qualitative concepts of corporate finance and leadership.

**Prompt:** This milestone requires you to write a draft of the Overview and Financial History sections (Sections I and II) of Final Project I, the corporate valuation report. This milestone requires you to select and focus on a specific corporation of interest for the larger final projects. To support your selection, you are encouraged to use Mergent Online. Refer to the provided Mergent Online Instructions for assistance in navigating Mergent Online.

**Specifically, the following critical elements must be addressed in this milestone:**

I. **Overview**: This section of your report will be devoted to providing a thorough overview of the background of the corporation you selected and setting the foundation for your later discussion of the challenges financial managers face. Specifically, you must address the following:
   A. Describe the **market** to which your corporation belongs, identifying the products or services your corporation sells, and the share of the market it has.
   B. Describe the **customer** base of your corporation and the top competitors for this customer base. Be sure to consider what motivates the customers and the challenges the organization faces in retaining the customer base.
   C. Describe the key inputs and sources of those inputs used to create the products or services as well as the key **resources** for corporate operation (such as staff, facilities, technologies, etc.) and the extent to which attaining all these resources presents a challenge to the particular organization.
   D. Analyze key market **trends** and issues within the industry for potential risks to the organization.

II. **Financial History**: The next section of your report should focus on the financial history and capital structure of your organization.

A. Quantitatively analyze three years of the corporation's finances using the provided **Excel** template. You will submit this template along with your report, and may embed pieces of the Excel template into your report to show key financial highlights for the following section. Please note that, for this assignment, you only need to complete the "Financial History" tab in the spreadsheet.

B. Summarize the financial **highlights** you determined from the analysis in the Excel template, explaining the significance of the key ratios for the overall financial health of the organization.

**Guidelines for Submission:** Your Overview and Financial History should be 3–4 pages in length, not including the Excel template you use to address section II.A, above. The written submission should use 12-point Times New Roman font, double spacing, one-inch margins, and APA formatting. Be sure to submit both your written response and the completed Excel template when submitting this assignment. Any citations should follow APA guidelines.

| Critical Elements | Proficient (100%) | Needs Improvement (80%) | Not Evident (0%) | Value |
|---|---|---|---|---|
| **Overview: Market** | Accurately describes the market, products or services, and portion of the market held by the chosen corporation | Describes the market, products or services, and portion of the market held by the chosen corporation, but lacks accuracy or necessary detail | Does not describe the market, products or services, and portion of the market held by the chosen corporation | 13 |
| **Overview: Customer** | Accurately describes the customer base and the corporation's top competitors for those customers | Describes the customer base and the corporation's top competitors for those customers, but lacks accuracy or detail | Does not describe the customer base and the corporation's top competitors | 14 |
| **Overview: Resources** | Accurately describes the key inputs and resources the corporation needs | Describes the key inputs and resources the corporation needs, but lacks accuracy or detail | Does not describe inputs and resources the corporation needs | 15 |
| **Overview: Trends** | Critically analyzes the market for key trends and issues that may pose risks for the corporation | Analyzes the market for key trends and issues, but lacks detail, logic, or focus on issues that may pose risks for the corporation | Does not analyze the market for trends and issues | 13 |
| **Financial History: Excel** | Correctly analyzes three years of corporate financial statements using the provided Excel template | Analyzes three years of corporate financial statements using the provided Excel template, but analysis contains miscalculations or is incomplete | Does not analyze three years of corporate financial statements using the provided Excel template | 20 |

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| **Financial History: Highlights** | Accurately summarizes the financial highlights determined from the Excel analysis of the corporate financial statements, citing key ratios that give a picture of the overall financial health | Summarizes the financial highlights determined from the Excel analysis of the corporate financial statements, but lacks accuracy or details regarding key ratios that give a picture of the overall financial health | Does not summarize the financial highlights determined from the Excel analysis | 20 |
| **Articulation of Response** | Submission has no major errors related to citations, grammar, spelling, syntax, or organization | Submission has major errors related to citations, grammar, spelling, syntax, or organization that negatively impact readability and articulation of main ideas | Submission has critical errors related to citations, grammar, spelling, syntax, or organization that prevent understanding of ideas | 5 |
| | | | **Total** | **100%** |