

# [Strategic Fundamentals and Environment] Summative Assessment: Outline & Rubric

## Summative Assessment Outline Strategic Fundamentals and Environment

**Competency Name:** Strategic Fundamentals and Environment

**Competency Statement:** Demonstrate knowledge of strategic fundamentals and environment.

**Summative Assessment Submission Title:** Strategic Positioning Plan with Voice-Over Presentation

**Competency Objectives:**

1. Develop an understanding of the role of strategy in a business environment.
2. Understand the techniques used in making strategy decisions.
3. Discuss the 3 steps in planning – (1) determining the organization’s mission and goals, (2) formulating strategy, and (3) implementing strategy.
4. Analyze a business process or situation using SWOT analysis.

**Program Learning Outcomes:** N/A

**Institutional Learning Outcomes: ILO 2 – Innovation and Creativity:** Construct a novel or unique idea, question, format, or product.

### Purpose of this Assessment

The final assessment for this competency is a plan that will explain how your strategy connects to your community from several vantage points, including financial ramifications and impact of the current leadership structures, and explains how this new strategy will create an improvement in your community. The purpose of this assignment is to develop the components of strategic fundamentals, including organizational performance. You will, however, create a business scorecard to analyze organizational performance in a later competency. A “need” can be defined as any opportunity improving health, welfare, and/or morale in a community. The business you select now may be used for two other competencies: Competitive Advantage and Implementing and Monitoring Business Plan.

### Items Required for Submission

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The items required for submission include the following:

1. A five- to six-page Strategic Fundamentals Plan
2. A 15 to 20 slide voice over presentation to describe the Strategic Fundamentals Plan

### Step ONE: Preparation

- Review the materials provided to you regarding this competency. The analysis and research from this competency will be used for the other strategy competency work that you will do, especially your final summative assessment for the BBA degree.
- Reflect on the community that you live in. Consider techniques and strategies you can bring to add value (financial, environmental, intrinsic, etc.) to your community based on an existing need.
- It is permissible to determine a business that you would like to develop throughout the three strategy competencies (Strategic Fundamentals & Environment, Competitive Advantage, and Business Plan) to assist with resolving a need within your community.
- Do some research about the business you have chosen using credible, academic resources. You will include them as references in both the plan and PowerPoint, but also cite them throughout your analysis as supporting information for your proposal.
- Develop a plan for your proposed project to structure your analysis. You will need to write a clear and concise plan with about one paragraph for each of the following sections (and subsections):
  1. **Introduction:** Clearly explain the problem your new business is trying to solve and state why this is the right strategy at the right time to provide value to your community. Support the viability of this business by showing demographic data, using the appropriate government data sources, designated with a .gov indicator on their websites.
  2. **Role of strategy:** How does the positioning of the new business increase value?
  3. **Techniques used to formulate the positioning:** What steps will be necessary to develop this new business?
  4. **Industry analysis:** What is the state of the industry overall? What is its history and what are future expectations for the industry as a whole?

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5. **SWOT analysis:** What are the strengths, weaknesses, opportunities, and threats for your particular business? Include a graphic as a visual summary. Microsoft Word “Smart Art” has templates that may be used.
6. **Strategic-Planning Process:** Discuss the following steps in the strategic-planning process:
  - A. How will you determine the organization’s mission and goals? How do you justify your organization’s mission and goals?
  - B. What are the strengths and weaknesses for your particular business?
  - C. Which one of the follows strategies from the competency will you implement for your particular business? Recall the Porter’s Key Strategies and Ghemawat’s “AAA” Global strategies, including:
    - Cost leadership
    - Differentiation
    - Focused cost leadership
    - Focused differentiation
    - Adaption
    - Aggregation
    - Arbitrage
  - D. How will you implement the company’s strategy? Recall the implementation strategies you read, including:
    - Tactical
    - Operational
    - Contingency
    - Crisis Planning
6. **Financial Considerations:** What are the financial ramifications related to your new business? How might your proposed strategy impact current leadership structures?
7. **Organizational Structure:** How could the organizational structures reposition to promote innovation and creativity that would result in greater organizational effectiveness and efficiency?
8. **Conclusion:** Summarize the key points you have made in a single paragraph with clear, concise, positive, language.

### Step TWO: Write Plan

- Write a five- to six-page Strategic Positioning Plan using APA citation format. Use at least three sources from your research.

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## Step THREE: Prepare Voice-Over Presentation

- Create a 15-20 slide voice-over presentation to provide more detail to your Strategic Positioning Plan. Use this opportunity to add more detail, eye-catching graphics, and interesting facts about your plan that you could not include in your written plan.

## Step FOUR: Complete Checklist for Submission

Before you submit, check to see if you have met the criteria noted below.

Did you...

- ✓ Clearly and succinctly state the problem the new business (or repositioning of an existing business) is trying to solve, and why this is the right strategy at the right time to provide value to your community?
- ✓ Use demographic data from .gov sources?
- ✓ Clearly and accurately describe the role of strategy and the techniques used to formulate its positioning?
- ✓ Include an industry analysis and SWOT analysis (with a graph)?
- ✓ Describe how the three steps in the strategic-planning process apply to your product?
- ✓ Discuss the financial ramifications and impact on current leadership structures?
- ✓ Indicate how the organizational structures might reposition to promote innovation and creativity, leading to organizational effectiveness and efficiency?
- ✓ Present sophisticated comparisons and contrasts of the benefits and consequences of multiple approaches or options in the overall analysis?
- ✓ Demonstrate sophisticated innovative thinking consistently by transforming ideas or solutions into an entirely new form through connection and synthesis?
- ✓ Make sure that the plan is well researched and uses at least three sources from the competency as well as three sources from student research?
- ✓ Provide resources that are effectively used and properly referenced?
- ✓ Consistently integrate ideas from alternate, divergent, or contradictory perspectives or ideas in the plan?
- ✓ Proofread your plan to ensure that it is logical, well-written, and of the required length? Spelling, grammar, and punctuation are accurate? APA formatting standards are followed; citations and reference page are correct?
- ✓ Create a Voice-Over presentation with 15 to 20 slides, and any visual/graphical representations that illustrate your analysis using SWOT, and state the “story” of the analysis in an interesting way?

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## Step FIVE: Submit Your Work

- Your completed final assessment documents should be submitted through the Final Assessment page of your competency.
- Please note, for files smaller than 10MB (i.e., most Word documents), use the corresponding “+UPLOAD STUDENT FILE” button to upload your final assessment assignments. For larger files of any type (i.e., voice-over PowerPoint files, videos, or image-heavy documents), please use the optional TEXT EDITOR to provide a URL where your grader can download your file.

The screenshot shows the submission interface for Assignment 5. At the top, there is a navigation bar with the Brandman University logo and links for Dashboard, Competencies, and Learning Journal. Below the navigation bar, there are two file upload areas. The first area contains a file named "SRM FA Doc1.docx". The second area is a dashed box with a plus sign and the text "Upload additional files to this assignment. This is optional". Below these areas, the assignment details are shown: "Assignment 5" and "5. A 10- to 15-slide PowerPoint presentation with supporting voice-over". A blue button labeled "Use File Uploader" is positioned below the assignment details. Below the button is a rich text editor with a toolbar containing icons for bold, italic, bulleted list, numbered list, link, and unlink. The text area of the editor contains the text "Download URL for Assignment 5: <https://fwk.box.com/s/2nwjgkwooz6pa7wm8uzojjwerzb7sl2>". At the bottom of the interface, there is a red bar with the text "Comments (Optional)".

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- How you create a download URL is up to you, but various free online providers, including Google Drive, Box.com, or Dropbox, offer this service. Please make sure that the URL you provide can be accessed by anyone with the link. For further instructions on how to create public links for uploaded files, consult the support pages for your chosen provider.

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Scoring Rubric for Summative Assessment

<i>Criterion</i>	<b>EMERGING (1)</b>	<b>DEVELOPING (2)</b>	<b>PROFICIENT (3)</b>	<b>EXEMPLARY (4)</b>
<b>Plan – Introduction</b>	Does not state or provide a vague description of the problem the new business or repositioning of an existing business is trying to solve. Does not state or provide a vague description of why this is the right strategy at the right time to provide value to your community. Fails to show appropriate demographic data.	Somewhat states the problem the new business or repositioning of an existing business is trying to solve, and somewhat states why this is the right strategy at the right time to provide value to your community. Shows demographic data.	States the problem the new business or repositioning of an existing business is trying to solve, and states why this is the right strategy at the right time to provide value to your community. Shows demographic data using .gov sources.	Clearly and succinctly states the problem the new business or repositioning of an existing business is trying to solve, and states why this is the right strategy at the right time to provide value to your community. Shows demographic data using .gov sources.
<b>Plan - Strategies</b>	Plan fails to include or minimally describes the following: <ul style="list-style-type: none"> <li>• The role of strategy and the techniques used to formulate the positioning</li> <li>• Industry analysis and SWOT analysis</li> <li>• The three steps in the strategic-planning process</li> <li>• The financial ramifications and impact on current leadership structures</li> <li>• How the organizational structures might reposition to promote</li> </ul>	Plan somewhat describes the following: <ul style="list-style-type: none"> <li>• The role of strategy and the techniques used to formulate the positioning</li> <li>• Industry analysis and SWOT analysis</li> <li>• The three steps in the strategic-planning process</li> <li>• The financial ramifications and impact on current leadership structures</li> <li>• How the organizational structures might reposition to promote innovation and</li> </ul>	Plan adequately describes the following: <ul style="list-style-type: none"> <li>• The role of strategy and the techniques used to formulate the positioning</li> <li>• Industry analysis and SWOT analysis (includes a graph)</li> <li>• The three steps in the strategic-planning process</li> <li>• The financial ramifications and impact on current leadership structures</li> <li>• How the organizational structures might reposition to promote</li> </ul>	Plan clearly and accurately describes the following: <ul style="list-style-type: none"> <li>• The role of strategy and the techniques used to formulate the positioning</li> <li>• Industry analysis and SWOT analysis (includes a graph)</li> <li>• The three steps in the strategic-planning process</li> <li>• The financial ramifications and impact on current leadership structures</li> <li>• How the organizational structures might reposition to promote</li> </ul>

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	innovation and creativity, leading to organizational effectiveness and efficiency	creativity, leading to organizational effectiveness and efficiency	innovation and creativity, leading to organizational effectiveness and efficiency	innovation and creativity, leading to organizational effectiveness and efficiency
<b>ILO: Analysis</b>	Presents little or no comparison and contrast of the benefits and consequences multiple approaches or option in the overall analysis.	Presents partial comparison and contrast of the benefits and consequences multiple approaches or option in the overall analysis.	Presents adequate comparison and contrast of the benefits and consequences of multiple approaches or options in the overall analysis.	Presents sophisticated comparison and contrast of the benefits and consequences of multiple approaches or options in the overall analysis.
<b>ILO: Innovative Thinking</b>	Does not make connections among alternative ideas or solutions through synthesis.	Demonstrates partial innovative thinking rarely transforming ideas or solutions into an entirely new form through connection and synthesis.	Demonstrates adequate innovative thinking sometimes transforming ideas or solutions into an entirely new form through connection and synthesis.	Demonstrates sophisticated innovative thinking consistently transforming ideas or solutions into an entirely new form through connection and synthesis.
<b>Research and Resources and ILO: Embracing Contradictions</b>	<p>The plan fails to use or uses fewer than three sources from the competency and/or fewer than three sources from student research. Attribution is missing, or sources given are poorly chosen.</p> <p>Does not integrate ideas from multiple alternate, divergent, or contradictory perspectives or ideas.</p>	<p>The plan uses fewer than three sources from the competency and/or fewer than three sources from student research. Although attribution is present, some statements are unsubstantiated, and the sources of some ideas are unclear.</p> <p>Rarely integrates ideas from alternate, divergent, or contradictory perspectives or ideas in the plan.</p>	<p>Research is sufficient to support the plan's conclusions and uses at least three sources from the competency as well as three sources from student research. Attribution of resources is generally supported.</p> <p>Sometimes integrates ideas from alternate, divergent, or contradictory perspectives or ideas in the plan.</p>	<p>The plan is well researched and uses at least three sources from the competency as well as three sources from student research. Resources are effectively used and properly referenced.</p> <p>Consistently integrates ideas from alternate, divergent, or contradictory perspectives or ideas in the plan.</p>

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<p><b>Writing Mechanics</b></p>	<p>The plan lacks clarity and may be confusing; too long or short. Numerous errors in spelling, grammar, and/or punctuation. Limited, if any, adherence to APA standards.</p>	<p>The plan is somewhat logical and well-written; too long or short. Some errors in spelling, grammar, and/or punctuation. APA standards are somewhat followed but with numerous errors.</p>	<p>The plan is logical, well-written, and of the required length. There may be one or two minor errors in spelling, grammar, and/or punctuation. APA formatting standards are followed with a few minor errors.</p>	<p>The plan is logical, well-written, and of the required length. Spelling, grammar, and punctuation are accurate. APA formatting standards are followed; citations and reference page are correct.</p>
<p><b>Voice-Over Presentation</b></p>	<p>Creates a Voice-Over presentation with few if any slides using visual or graphical representations related to the Strategic Positioning Plan; fails to tell any of the “story” of the analysis.</p>	<p>Creates a Voice-Over presentation with slides using visual or graphical representations related to the Strategic Positioning Plan; tells some of the “story” of the analysis.</p>	<p>Creates a Voice-Over presentation with 15 to 20 slides using visual and graphical representations to illustrate the Strategic Positioning Plan; tells the “story” of the analysis in an appropriate way.</p>	<p>Creates a Voice-Over presentation with 15 to 20 slides using targeted visual and graphical representations to illustrate the Strategic Positioning Plan; tells the “story” of the analysis in an interesting and thoughtful way.</p>