**Formulation Analysis Evaluation**

|  |  |  |
| --- | --- | --- |
| ***Section of report*** *Range is 0.0 –4.4* | Form | **Content** |
| Mission, Objectives, Goals, stakeholders | * Updated Information
* Current Mission
* Goals & Objectives
* Stakeholders
 | * If case info. needs updating, update it and bring the audience/reader up to speed.
* Provide the firm’s current Mission & Goals.
* Who’re the stakeholders & what do they want?
 |
| General and Industry Environment  | * Macro Environment (Demographics, Economy, etc.)
* Industry Environment (Porter’s 5)
* Competitors (top 3 or so)
* What are the industry dynamics
 | * Clearly outline these elements.
* Industry dynamics include the likelihood of competitor attach and response and the form these attacks and responses are likely to take given conditions in the environment
 |
| Resources and Capabilities / Core Competencies  | * Resources (Tangible / Intangible)
* Capabilities (by Functional Area)
* Core Competencies (VIRO)
* Performance
 | * Details will be needed (e.g. you should say “Their physical plant is the most modern and efficient in the industry and it allows them to….” rather than simply listing “physical Plant” under a list of tangible resources).
 |
| Business, Corp. and International Strategies | * Business Level Strategy
* Corporate Level Strategy
* International Strategy
* Cooperative Strategy
 | * Tell me what is their:
* Generic Bus. level strategy is (Cost Leadership, Diff, Focus, etc.)
* Corp. level strategy (Conglomerate, Vert. Integration Single bus., etc.)
* International Strategy (Global, Transnational, Multidomestic).
* Any Joint Ventures, etc.
 |
| Average |  |  |

**Formulation Analysis Outline**

The written version should be no more than eight pages, excluding cover and citations, no table of contents or exec summary needed, no less than 12 pt, 1½ space, and no less than 1-inch margins. Mix the tables and figures into the text as they are mentioned in the paper.

INTRODUCTION

 Background in Brief

 The Organization Today

MISSION, GOALS & STAKEHOLDERS

 Mission

 Goals and Objectives

 1. …

 2. …

 Stakeholders

 1. …

 2. …

EXTERNAL ANALYSIS

 General Environment

 1. …

 2. …

 Industry Environment

 1. …

 2. …

 Competitor Analysis

 1. …

 2. …

 Analysis of Dynamics of External Forces

 1. …

 2. …

INTERNAL ANALYSIS

 Resources

 Tangible

 1. …

 2. …

 Intangible

 1. …

 2. …

 Capabilities

 1. …

 2. …

 Core Competencies

 1. …

 2. …

 3. Three is plenty

 Performance

 1. …

 2. …

STRATEGY

 Business Level Strategy

 Corporate Level Strategy

 International Strategy

 Cooperative Strategies