

Unit 3 Assignment: Team Assignment Financial Statement Analysis

This Assignment presents the opportunity to work with your classmates in a 'virtual' team project. As teams, the ability to interact and solve problems together, when at a distance, is a key skill in today's business environment.

You have been assigned to a Team (i.e., depending on course enrollment, a five or six person group working as a team) to answer the Case Assignment instructions below. One person from the group is to turn in the Assignment for the group to the Dropbox. Each person in the group must turn in their individual peer evaluations to their Dropbox to receive credit for the Assignment. The Team Peer Evaluation Form is located in Course Documents and will be individually submitted in addition to the one group submission of the case analysis.

This Assignment will assess your knowledge based on the following outcome:

PC-1.1: Engage in a team setting with professional integrity and respect.

Supplemental Resource (not required) - This material can be a very helpful resource for this and subsequent virtual team projects. The e-text below can be found in the Library:

Lipsinger, R., & DeRosa, D. (2010). *Virtual team success: A practical guide for working and leading from a distance*. Hoboken, NJ: John Wiley & Sons, Inc.

Please note the sections on social loafing (pp. 67–68, 78–88). Pages 76, 107 and 138 are helpful Reference Guides intended to help you troubleshoot your virtual team.

Optional Guidelines

Experience has shown the following timeline to be helpful. Please do not feel constrained by this time line; it is not a graded item.

- Unit 3: Wednesday — Greet each other in the Team Discussion Board.
- Unit 3: Thursday — Determine who will lead the project, who will do which parts, by when, what your communication expectations are and when you will be meeting next.
- Unit 3: Friday — Confirmation of delegated duties. Delegated parties accept their delegated duty.
- Unit 3: Saturday — Project Leader reassigns any duties not accepted by individuals on the team.
- Unit 3: Sunday — Submit draft parts to Project Leader. Project Leader posts draft of the paper in the Team Discussion Board.
- Unit 3: Monday — Team edits/improves the draft Assignment deliverable.
- Unit 3: Tuesday — One team member submits the paper. Individual Team Peer Evaluation Form must be submitted to receive a grade for the Assignment.

Some learners have found this to be a helpful guide for their first meeting or initial Discussion Board post.

Agenda:

- Refer to The Team Project Financial Statement Analysis Guidelines (below). What team are you on and who are your teammates?
- Who will be the team leader?
- Explicit understanding by all of the expectations as a team member.
- Determine methods of communication and protocol; clarify date and time of next meeting.
- Who will complete which of the financial ratio classifications and their respective ratios?

- Who will compile or collect all data to prepare the final document?
- What will be the arrangement to ensure all team members review and approve the document?
- Determine communication protocol.

Team Project Financial Statement Analysis Guidelines

Use the five classifications of financial ratios, 1) Liquidity, 2) Activity, 3) Financing, 4) Profitability, and 5) Market to assess the financial performance for Walmart. Excellent resource material can be found in the Financial Statement Analysis Tables 2.4 to 2.8 in your text. Each of these classifications includes at least two respective financial ratios.

A team member is typically assigned one of the five classifications. I.e., student A will be responsible for Liquidity and student B will be responsible for Activity, and so on. You will present a definition of the classification by citing the course text and other scholarly sources.

The team leader (compiler of all member analyses) may need to be assigned a classification as well; team size will dictate this.

Your paper, based upon your team's collective analysis, should include a measure of and analysis of financial outcomes based on at least two financial ratios for each financial ratio classification. I.e., the Liquidity classifications of ratios are based upon the Quick and Current ratio outcomes.

You will calculate ratios for each classification, two ratios per classification, for the three years data. I.e., the Current ratio may have been 2.0 in year three and 1.5 the following year, and .75 in the most recent year. It is based on these results that you will measure financial performance, or trends from one year to the next. It is imperative that the ratios-numbers, and quantitative outcomes, support your analysis.

Review the following documents:

1. [Team Project Outline](#)
2. Three years of data for [Walmart's Balance Sheet and Income Statement](#).
3. [Team Project Answer Sheet](#)

Criteria:

Your paper should use correct APA 6th formatting for your in-text citations to justify your discussion and place references at the end of the paper. Be sure to cite sources to explain what each of these ratio classifications tell an investor.

Avoid using quotations, you should paraphrase the material and use an in-text citation to give credit to the reference. Review the APA formats found in Writing Resources accessed through the Academic Success Center within the Academic Tools area of the course.

Include in your paper:

- Cover page with each team member's name that participated on the team project
- Introduction, the purpose of the analysis
- Analysis, an explanation of what each ratio classification assesses. (A minimum of one paragraph for each ratio.)
- In which financial ratio classifications are negative ratios occurring? How can this be corrected?
- In which financial ratio classification are positive ratios occurring? How can this be maintained?
- Conclusion, why would you (or would you not) invest in Walmart.
- Reference page

Directions for Submitting Your Team paper

Make sure that you save a copy of the paper you submit.

1. To submit your paper, have one member of your group go to the Dropbox and select Unit 3: Assignment and follow the instructions.
2. Individually, each member of the group completes the peer evaluation form and individually submits the peer evaluation to the Unit 3 Team Peer Evaluation Dropbox. (file name: Kris.Kringle.peer.evaluation.unit-3)

Unit 3 Assignment: Team Assignment Financial Statement Analysis	Points Possible	Points Earned
Content		
Responses successfully answer the Assignment question(s); thoroughly uses the text and other literature. Includes a strong thesis statement, introduction and conclusion. The main points of the paper are developed clearly. Quantitative outcomes support analysis.	20	
Definitions of ratio classifications are supported by proper scholarly sources. References are applied substantively to the paper's topic. The analysis skillfully addresses counter-arguments and does not ignore data contradicting its claim. Refers to sources both in-text and in the reference page.	20	
Achievement of a well-synthesized paper using contributions from team participants to achieve a paper that resembles the collective talents of the group. Team member performed with integrity and respect towards other participants of the team (peer evaluation). Points will be deducted if the Peer Evaluation Form is not submitted to the Dropbox.	10	
Analysis		
Response exhibits strong higher-order critical thinking and quantitative analysis (e.g., trends supported by clearly defined evaluation). Paper shows original thought.	10	
Analysis includes proper classifications, explanations, comparisons, and inferences.	10	
Critical thinking includes appropriate judgments, conclusions and assessment based on evaluation and synthesis of information.	10	
Writing		
Grammatical skills are strong with typically less than one error per page. Correct use of APA 6 th edition formatting.	6	
Content is appropriate to the Assignment: fresh (interesting to read), accurate, (no far-fetched, unsupported comments), precise (say what you mean), and concise (not wordy).	8	
Paper is in 12-point font. Narrative sections are double-spaced with a double-space between. Paper is free of serious errors; grammar, punctuation, and spelling.	8	
Total	100	