

A core team deliverable is a financial spreadsheet to outline key components of the P&L for the 'new' LIMIT proposal to include what you are asking of the capital expenditure group (CEG). Keep in mind the group can give money but will want to negotiate a % of the future profits. This team will be responsible for researching the ideal "deal" from the CEG. Think "Shark Tank". Include your key learnings of leadership and culture while working with sub teams.

When hiring what values and diversity do you recommend?

### **Operations Team**

The goal of this team is the creation and distribution of product which will make or break the success of LIMIT. Creating and distributing product is at the apex of a manufacturer and was a huge stumbling block for the company.

Keep in mind this is a start up and all is possible for operations. You can make the product yourself, have it made by someone else, collaborate with another company through licensing of their product with a brand name of your choice, etc.

In your proposal please align to the strategy teams now, next, future roadmap of product. This should include how to make the product, how to distribute the product and what to do if inventory does not align to demand. You will need to closely align to other functional teams so you understand what product(s) needs to be made, the quantities needed and how the products will be distributed.

This team needs to support and advise each team. Collaboration is essential. You need to be proactive in communication of what "can" and "cannot" be done and be prepared to share alternate solutions.

When hiring what values and diversity do you recommend?

### **Strategy & Leadership Team**

This team is responsible for working with each sub team to create Key Performance Indicators (KPIs) reporting and ultimate insights to include each sub teams KPIs. How do you exceed the goal of the 4 ROI?

This team did not exist within the A round launch of LIMIT and was a big miss. It is important to align each group to a common goal to include KPIs and ensure reporting that monitors success.

This team is responsible for now, next, future strategy to include inputs from each sub team. Final deliverable will include KPI reports to include a "red", "yellow", "green" scorecard on where LIMIT is at, where LIMIT is going with the sub team's proposals, as well as learnings and recommendations to each KPI.

Align to your core audience of a capital expenditure group (CEG) potentially giving LIMIT one more chance for Series B Funding.

When hiring what values and diversity do you recommend?

- Cross functional leadership and planning
  - As a planning group, what are your observations on how to have a "workplace with no limits"?
  - What was your biggest stumbling block?
  - What was your greatest strength as a team?
  - How do you harness and direct the diversity of thought amongst the team?
- What are the insights and key findings from your Retail Adventure?

### Research and Development/ Business Analytics Team

*people also try ref calls*

This team supports and advises each team. Collaboration is essential.

Reporting to include insights on consumer, shopper, retail landscape, finance and operations. Can include qualitative and quantitative findings.

In this field, you will find everyone has an opinion and everyone has to do it his/her way. Your role is to listen to all, and create a process, report and roadmap that will address needs in one cohesive way. You also have to be mindful in this field of "boiling the ocean". You will need to prioritize and identify the Key Performance Indicators (KPIs) that will align to your priority of success.

When hiring what values and diversity do you recommend?

### Sales and Marketing Team

This team is responsible for devising the sales & marketing plan for launch and should incorporate all areas of the 5Ps -- Product, Placement, Price, People, Promotion.

You should work cross-functionally with all groups to ensure all elements are incorporated in developing your core consumer target and how you will reach them. Plan to include refinement based on feedback.

This team is responsible for presenting the 5P plan, key learnings and focus areas. Please present your solution to the previous gap in planning as well as core insights and improvements for culture. You can hone in on one, a few or all of the 5Ps. Keep in mind there is cost and organizational structure to address each of the 5Ps. It is important to work with your sub teams to ensure what you are presenting is addressed by cost and upside. Include your key learnings of leadership and culture while working with sub teams.

When hiring, what values and diversity do you recommend?

### Finance Team

This team is responsible for the profitability and core inputs of the financial plan. How do you exceed the goal of the 4 ROI?

This team is responsible for working with their team members and mentors and presenting to each sub team to ensure they have the inputs needed to design the right product.

## MINI ME

### **Focus Group Research Findings from first round of project:**

- ... "my Bianca" is my baby... we match clothes, discuss world events and travel (laugh)... there is nothing I would not do for my Bianca."
- ... "Anything I have seen at my local Target or Walmart has not been to Peaches' standards... we like bling, bling, bling."
- ... "My Hunter has an alter ego. He likes to dress up for holidays and feel special."

Their pets are mini humans... This cohort's prince or princess.... Their mini "me".

## Retail Landscape

There is a sizeable pet market that is fragmented in how it reaches shoppers as well as how it bundles easy solutions for their products.

An array of products exist; however, there is a huge opportunity to cater to the "mini me" audience in a simple bundled way.

## Approach

For this case assignment you will be required to align your work across all teams (business/functional areas). There should be one person on each team assigned to sharing information with other teams. During the final presentation, business leaders will be looking for one, cohesive plan for the LIMIT startup company that is comprised of different parts.

## Deliverable

**FINAL PRESENTATION:** 20-25 minute presentation (plus Q&A) to industry leaders

- **REMINDER:** This is one, cohesive business plan with several parts. It is up to the entire class to ensure that the plans are connected.
- Each team (business/functional area) PowerPoint should include the following in your section of the presentation:
  - Key insights
  - Unique functional findings
  - Proposal on your roadmap to ensure flawless execution for your function
- During the final presentation, functional teams will present in the order outlined on the "Approach" slide

**PAPER:** You are responsible for turning in a 4-5 page paper outlining the following:

- A summary of key insights you learned about your functional area.
  - What are the core roles & responsibilities to solve and execute this piece of the broader proposal?
  - What cross-functional relationships were established (how did you connect with other teams)?

## LIMIT Case Study

### Background

Armed with their focus group research, the LIMIT startup company distributed their LIMIT BOUTIQUE merchandise at regional community fairs. LIMIT failed in the following areas:

- Culture – The team did not listen or align to diversity of ideas and execution.
- Placement – The target demographic was not aligned with core consumers.
- Product – The product was too generic. Consumers want to mix and match accessories ranging from purses, to jewelry, to custom-created clothing. At the fairs, LIMIT offered rhinestone leashes in one size as well as the community town name on pet shirts.
- Procurement – Orders were 100% merchandised at the fair. No ability to customize and out of stocks were an issue.
- Finances – The initial proposal was \$250,000 of funding for net revenue of \$400,000.

*Total Cost = \$250,000*

*Total revenue – expenses = \$40,000*

*Total Loss = \$210,000*

### The Challenge

Although they spent money on research, the LIMIT startup company did not translate insights into the right strategy to execute in a now, next, future roadmap. There were a lot of “bosses” and was very little collaboration. There was also a lack of inclusion on the team. Henry, the founder of LIMIT, needs to create a new proposal for another round of funding. He needs to convey to potential investors that the company is poised for future growth based on the business opportunity. It is crucial to create an inclusive culture where the brightest minds can thrive.

Henry is asking the Concordia Capstone team to create a brand new proposal to secure Series B funding. The company needs a new way to leverage insights and to ultimately do the below:

- *Create a collaborative environment. The dual purpose of this assignment is a business case plus “workplace with no limits” inclusive leadership.*
- *Present a proposal for funding that includes a short and long term strategy, including finance, sales, marketing and operations plans for a ROI of 4, meaning the net revenue is 4x what the company makes.*