

**ANALYSING A SPREADSHEET AND PRESENTING A BUSINESS
REPORT**

Due Date/Time: by Friday 20 September 11:59 pm

(20% of Final Grade)

Case Study

“Eclipse Vans” is a manufacturer of recreational vehicles (Vans, camper trailers and motorhomes). They build vehicles in their northern suburbs factory and sell direct to the public. They pride themselves on building modern, luxury off road and touring vehicles at affordable prices.

Abdul and Joeline Hussein own and manage the business. Joeline manages reception, staffing, customer issues and accounts. Abdul manages the manufacturing process. Joeline has hired two junior and one senior sales staff. Staff are paid an annual base rate and a commission which is based on the profit of each sale made (see spreadsheet).

Customers pay an initial deposit of 10% and the remainder on delivery. A set retail price is charged for vans, which is dependent on the type/model of the van. Abdul has calculated the cost price for each van (excluding batch preparation costs) and added a 20% profit margin to all vans and associated accessories. Vans are manufactured in ‘batches’ based on the model. Abdul has estimated the ‘preparation’ costs for production of each batch at \$5,000. He takes this figure into account when calculating profitability.

Eclipse vans are advertised in several ‘Camping’ and ‘4WD’ magazines. In 2018, in an effort to further increase sales Joeline decided to offer an ‘options pack’ to each customer which could be purchased at a special discounted price. The pack being offered depended on the van type (see spreadsheet).

Over the past two years Joeline has recorded details of all van sales in an excel workbook. She has asked you to use the data provided in the spreadsheet to complete relevant calculations and to use Excel ‘tools’ to analyse the data provided. She then requires you to write a business report which analyses and discusses both profit growth and the various options available to help increase future profitability.

Joeline and Abdul are interested in both quantity and profitability of sales. They hope you can provide some insight regarding, the type of vans they should focus their efforts on. Joeline also wonders if she should make changes to the ‘options pack’ offer. Perhaps the data has highlighted other actions that would assist them in improving profitability.

A spreadsheet has been provided containing the data for “Eclipse Vans” sales for 2017 and 2018.

In summary

Undertake descriptive and predictive analysis of the data Joeline has maintained over the past two years. Present your findings in a professionally presented report:

- Provide an overview of profitability trends (past and present) undertaking predictive analysis.
- Discuss the results of your descriptive analysis and options for future sales growth (based on the requirements of Abdul and Joeline).
- Discuss at least one other action which you believe could assist profitability and is supported by the data you have been given.
- Make recommendations with regard to future changes which might assist in further improving profitability. Briefly justify these recommendations (i.e. prescribe what should be done and why this would be helpful, drawing on your predictive and prescriptive analysis).

PREPARING THE BUSINESS REPORT

Report Content

The analysis, findings and recommendations which you prepare for Jane should be outlined in a professional business report.

This report should include:

- A **title page** – with a relevant graphic, report title, student name/number, course name (Business Information Systems), course number (ISYS2056), your workshop time and your workshop tutors' names.
- A **Table of Contents (TOC)** **automatically generated by Microsoft Word**. **Default settings for the table of contents should not be altered.**
- A brief **introduction** which outlines clearly the purpose of the report.
- A discussion regarding the **results** of your analysis. Possible options for increasing future profitability have been included.
- Identification and discussion of **one further action** that might improve profitability (which has been identified through your analysis)
- A short **concluding summary** of the major findings of the report (supported by figures).
- **Clear recommendations** that Joeline and Abdul can adopt. These recommendations must be drawn from the analysis you have carried out and must have been discussed in the body of your report.

Report Format

The report should be developed using the guidelines covered in Canvas and workshops.

Specifically, you should:

- Ensure your report is concise: 1000 words. This word count includes title page and TOC. It does not include appendices (Note: a 10% variance is acceptable – i.e. the report should be between 900 and 1100 words).
- Present the report in a professional, business format with no spelling or grammatical errors.
- Use appropriate headings and subheadings throughout the body of the report.
 - Use Times New Roman font.
 - Use double or 1.5 spacing.
 - Fully justify all text in the report.
 - Include a page header with a suitably formatted title (the header must not appear on the title page).
 - Include a page footer with your name, student number and page number (the footer must not appear on the title page).
 - Include relevant charts and tables (screenshots of your spreadsheet are not appropriate) you have created in the body of your report (appropriately labelled). The material in the charts and tables must be discussed as part of the paper.
 - In an appendix include screen shots of calculations (as discussed below) which you have used to assist in your analysis (Note: You do not need to refer to this appendix in the body of your report). A guide to inserting screen shots commences on page 4 of this document.

Report Submission

The Business Report must be submitted, in MS Word format, by Friday 20 September 11:59 pm, via the link provided in the “Assignments” area on the ISYS2056 Business Information Systems site on Canvas. A Student Guide to submission (using Turnitin) is available at:

<https://www.rmit.edu.au/students/support-and-facilities/it-services-for-students/canvas/turnitin>

A Guide to inserting a screenshot in 'Word'

- Open and/or minimise the program/sheet you wish to create the screen shot from (in this case your Excel document). As your screenshots are designed to show calculations, you should make sure you have highlighted the relevant cell and the function is clearly visible in the function dialogue (fx) box.
- Open your 'Word' document.
- Select Insert/Screenshot/Screen Clipping.
- Select the sheet you wish to create the screenshot from. The screen should fade and a + appear. Use the + as a cropping tool to select the required screenshot. Note: There is no need to show every cell. (See Figure 1 in which one of the relevant cells is highlighted (B3) and the function for column B is clearly visible.)
- Label the screenshot appropriately.

B3		fx		=COUNTIF('Sem 1 2018 '!D:D,A3)	
	A	B	C	D	
1		Student Numbers			
2	Class	Sem 1 2018	Sem 2 2018	Sem one 2019	
3	Petite 1 (ages 2-3)	26	26	26	
4	Petite 2 (ages 4-5)	43	43	43	

Figure 1 - Screen shot of Countif function

If you need to create a screenshot of a column that is not located near the fx box (see Figure 2) you can:

- Select the relevant cell. Double click on the cell to show the formula.
- Create screen clipping as per the instructions above. Provide an appropriate label.

H	I	J	K	L
Sem 1 2019				
6240	=SUMIF('Sem 2 2019'!D:D,A3,'Sem 2 2019'!J:J)			
10320	SUMIF(range, criteria, [sum_range])			
19200	19200			
17600	17420			
8000	8000			

Figure 2 – Screenshot of Sumif function

To show several formulas in the one screenshot (see Figure 3) you can:

- Select the relevant cells.
- Select Formulas/Formula Auditing/Show formulas.
- Take the screenshot as per the directions above. (**NOTE: Text needs to be large enough to be read clearly.**)

File Home Insert Page Layout Formulas Data Review View Developer					
fx AutoSum Recently Financial Logical Text Date & Time Lookup & Reference Math More Functions Name Manager Define Name Use in Formula Trace Dependents Trace Arrows Remove Arrows Evaluate Formula Formula Auditing Watch Window Calculation Options Calculate Now Calculate Sheet					
I3 fx =SUMIF('Sem 2 2019'!D:D,A3,'Sem 2 2019'!J:J)					
Sem 2 2018	Sem one 2019	Sem two 2019	Revenue \$	Sem 2 2018	Sem 1 2019
=COUNTIF('Sem 2 2018'!D:D,A3)	=COUNTIF('Sem 1 2019'!D:D,A3)	=COUNTIF('Sem 2 2019'!D:D,A3)	=COUNTIF('Sem 1 2018'!D:D,A3)	=SUMIF('Sem 2 2018'!D:D,A3,'Sem 2 2019'!J:J)	=SUMIF('Sem 1 2019'!D:D,A3)
=COUNTIF('Sem 2 2018'!D:D,A4)	=COUNTIF('Sem 1 2019'!D:D,A4)	=COUNTIF('Sem 2 2019'!D:D,A4)	=COUNTIF('Sem 1 2018'!D:D,A4)	=SUMIF('Sem 2 2018'!D:D,A4,'Sem 2 2019'!J:J)	=SUMIF('Sem 1 2019'!D:D,A4)
=COUNTIF('Sem 2 2018'!D:D,A5)	=COUNTIF('Sem 1 2019'!D:D,A5)	=COUNTIF('Sem 2 2019'!D:D,A5)	=COUNTIF('Sem 1 2018'!D:D,A5)	=SUMIF('Sem 2 2018'!D:D,A5,'Sem 2 2019'!J:J)	=SUMIF('Sem 1 2019'!D:D,A5)
=COUNTIF('Sem 2 2018'!D:D,A6)	=COUNTIF('Sem 1 2019'!D:D,A6)	=COUNTIF('Sem 2 2019'!D:D,A6)	=COUNTIF('Sem 1 2018'!D:D,A6)	=SUMIF('Sem 2 2018'!D:D,A6,'Sem 2 2019'!J:J)	=SUMIF('Sem 1 2019'!D:D,A6)

Figure 3 – Screenshot showing functions in several columns