TOUR 435: Project Definition Template

Students participating in this course will be put into consulting groups working with a business to diagnose a problem or opportunity, identify possible solutions, make recommendations, then follow through on their recommendations. This template is designed to give the students an introduction to you and your business, and to get them started on the pathway to diagnosing the issue at hand. Students will be assigned a business to work with, and will then contact you directly to follow through on information they need in order to get started.

***Please fill out the information in the following sections.*** Each section begins with a brief description of what can be included. I am looking for a brief outline that provides adequate information to move the project forwards without getting bogged down in too much detail. If you have any questions, now or at any time, please feel free to contact Cheryl Hurlbut at [cherylhurlbut@capilanou.ca](mailto:cherylhurlbut@capilanou.ca) or by phone at 778-462-2313 (iPhone).

# Client Information

|  |  |
| --- | --- |
| Company Name: |  |
| Contact Name: |  |
| Address: |  |
| Email Address: |  |
| Phone Number: |  |
| Website: |  |
| Preferred contact method: |  |
| Days/times with best availability: |  |

# Strategic Environment

## Organizational Overview

*In this section, consider any or all of the following, and go beyond these as you like and feel it would provide more insight:*

* *Describe your organization: history, mission, vision, goals.*
* *Provide a bit of context on your products/services – your competitive edge*
* *How well is your business operating per your expectations? Busy periods/slow periods?*
* *Any high level information on marketing, sales, costs and revenues as might be useful for initial consideration and context.*
* *What is your organizational structure and staff complement?*
* *What is the company’s philosophy on sales/service, working with customers, working with staff?*

## Business Need/Problem (Opportunity) Statement

*What is the need or opportunity, as you see it? Elaborate as you like to provide initial context. You can classify under general categories of marketing, branding, diversification, inventory, strategy, sales, operations, cost reduction, or other as you feel is appropriate.*

## Drivers for Change

*What are the internal and external forces that influence the decision to pursue the need or opportunity? Examples of internal forces include technological capacity, organizational culture, financial management, employee morale, poor delivery, competition, and high wastage. Examples of external forces include the economy, political influence, new competitors, technology, and customer satisfaction.*

* You can outline in bullet form if you like

## Desired Business Outcomes

*Outline your desired business outcomes for this project here. Categorize them if you like – such as marketing and financial – for example.*

* Example: Increased cash flow, reduce costs

# Supporting Documents / Resources

*If you have any documentation (e.g. strategic plan, marketing plan, financial statements) you would like the group to consider in their analysis, please provide initial context on those here, and also list the contact person who could provide access to them. Also, organizational staff that the group could consult with for valuable input and insight would be useful here, if available at this time. Other supporting information you may wish to point out could be from your website(s), social media, Facebook, etc. Students would sign a confidentiality agreement as required.*