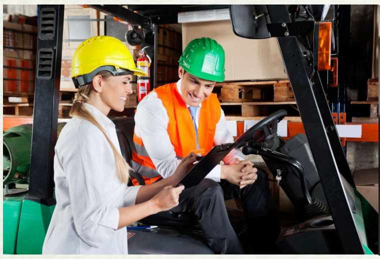
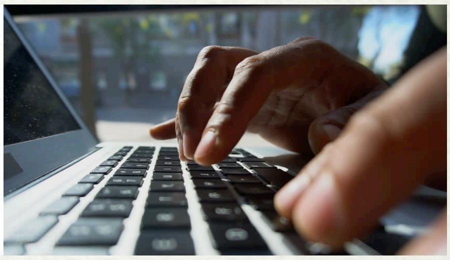
IB Business Management

Higher Level Internal Assessment

A Guide for Students

First examinations May 2016





Date	**Action**
September 2018	Research Proposal - Orals
September 2018	Research Proposal – Draft Due
October 2018	First Check – progress review
November 2018	Final Draft – uploaded into managebac – detailed written feedback provided (only allowed 1 time)
January 2019	Complete IA Due – uploaded into managebac and turnitin
** Exact dates provided closer to due date	

Table of Contents

Instructions to students

Note that any text shown here is direct instruction from the IBO. Any text with a grey box has been added to highlight further expectations of students

Introduction

The HL internal assessment is a research project that allows students to demonstrate the application of their skills and knowledge to business issues or decision-making

HL Research Project

Requirements

You must select a **real business organization** or **a range of organizations (industry)** for this, not a fictional one, and the issue or decision under investigation must also be real.

You are expected to gather **primary research** from the organization and use this as a base for your report. Secondary research may be used as support.

You have to carry out research that addresses an **issue** facing a business organization or range of organisations or analyses a **decision** to be made by a business organization or range of organisations.

You must also produce a **research proposal** that can be used as a primary planning document and be presented in terms of an action plan. It must not exceed 500 words.

Your **title** is very important. The research question should be forward-looking, targeted at an issue or a decision still relevant for the business organization(s) rather than descriptive of something already finished, and should require you to make recommendations for further action. Guidance from the teacher in formulating an appropriate research question is important.

You must produce a written report that does not exceed **2,000 words**.

Ideally you should choose your own topic and organisation that you find both **interesting** and **motivating**.

Bear in mind that some organizations **fail to provide data**, which may undermine the quality of your report. So before you start, make sure that you will be able to obtain the necessary data from the chosen organization. This usually includes **financial related data.**

You must also be aware of **ethical considerations**. There is a need for tact, sensitivity to other people and respect for confidentiality.

Research Proposal

The internal assessment must start with a research proposal. This will become the primary planning document, giving direction to the research project. The maximum length of the research proposal is **500 words. The word count must be stated on the submitted work.** If the word limit is exceeded, the teacher's assessment must be based on the first 500 words of the proposal. It will not be read beyond 500 words.

It MUST be written in the future tense – it is a proposal for the future.

The research proposal has a required format consisting of four components.

Research Question

This should include:

- **Research question:**

This is your title. It must be posed as a question.
The title can be modified/perfected before the final deadline. You should consult with your teacher on the title.
It must be forward looking rather than descriptive and require you to make recommendations for further action

- **Rationale for study:**

Why did you choose to investigate this specific question? The reasons should be **business** related, not personal. The problem, issue or strategy should also be something the business wants to be investigated, not something you want to investigate. You also must place the business in context – its position in the market/industry – be specific.

Proposed Methodology

This should include:

- **Areas of the syllabus to be covered:**

Specifically state the name and sections of the course that will be included, no explanation is needed. Ideally, there should be between 3 and 6 areas, but it depends on the size and nature. The selected areas should be *analysed*, and not just mentioned in the report. A classic example is 1.4 stakeholders, unless performing stakeholder analysis, 1.4 should not be identified. These should relate to the RQ and rationale.

- **Possible Sources of Information:**

What 'general' sources will you use. This will include the job title(s) of managers/employees for specific information, the groups of people if conducting surveys, the names of documents you will ask for and read.

- **Organizations and individuals to be approached:**

Get specific - Who will you ask the questionnaire/survey to?
WHO will you interview. What is their role, or their name?
Who do you think will be the most useful person approached?
What information do you hope to get from these people?

It seems repetitive from before (and it is), but just be general first, then be specific, without repeating yourself too much.

- **Methods to be used to collect and analyze data, and the reason for choosing them:**

What main primary methods will you use to get your information (interviews/survey/questionnaires/observations/focus groups) and why? What are the advantages and possible disadvantages to these **methods**? What supporting secondary information will you use and why?
If using a sample of people to represent a greater number, what sampling methods will you use and why? Will this information be useful?
What methods will you use to collect secondary data and why?
What tools (business or other) do you plan to use to analyse your data? Will you investigate using percentages or graphs for quantifiable data?

Anticipated Difficulties, such as limited or biased sources

This should include:

As explicitly stated in the title, what difficulties regarding data sources and bias will you have? Also understand that *all* sources just about contain bias, but be more critical when assessing bias.
What other problems do you think you will face? (e.g. language barrier etc.) ?
How do you propose attempting to solve these problems?

Do you see yourself facing **any confidentiality/sensitivity issues** and how will **you solve these**? Remember, you cannot write strong recommendations based on weak information. Some financial data (not necessarily a balance sheet or profit and loss) is essential to achieving the top grades.

Action plan

This should include:

- **The order for activities and a timescale for the project:**

This is evidence of planning – it must be as specific as possible. It should also allow for modification after it has been finalised. This means that if you add SOME handwritten notes to it, they will not be included in the word count!

It is a very good idea to use a Gantt chart rather than a table, as it demonstrates business knowledge. Furthermore, it is a tool that uses very few words, so will allow you to write more about the 3 points above (the 500 word maximum is a tight word count).

Include all the main steps from conducting research (be specific), to analysis of the research using the business tools, development of a draft report, making modifications, and finally, submitting the report TO THE BUSINESS!

Example table for the action plan. If you use the table, remember it is for YOU, not for the teacher. This means if you add explanation, it is to remind YOU what needs to be done

Date to be completed	Action	Explanation	Modifications
(add when)	(add your action)	(be specific about what you will do)	(leave this blank – can add handwritten notes to this later)

How to frame Business Management HL IA research question (not from IBO)

Structure of questions

	Question	Remarks
1	Why are XXX Cyber café's profits declining?	General and very broad question. It should be specific.
2	What measures can XYZ bakery take to revitalize its profitability?	Instead of what measures, candidate should have analysed the particular measure or method.
3	What measures can XYZ Residential School take to arrest increasing teacher turnover to improve the academic performance of the students?	Good question. Should have improved by analyzing a particular measure. This question is very specific about the problem and expected result.
4	What type of diversification of operations at XYZ Company would arrest its declining profits?	Candidate should have analysed the particular method of diversification
5	What measures can XYZ Tailors take to improve its cash flow?	Candidate should have analysed the particular measure to improve the cash flow.
6	Should XYZ Gems stop outsourcing of making of gold ornaments in order to increase its profit margin?	Good question
7	Will opening a new XYZ Fashion store in Location A lead to an increase in profitability?	Good question

Question development process. (Not from IBO)

	Question	Remarks
1	How can ABC Company improve its labour productivity?	Question is not specific
2	How can ABC Company improve industrial relations?	Question is not specific
3	How can ABC Company reduce labour problems?	Question is not specific
4	How can ABC Company reduce labour problems to increase its profitability?	Better, could have been improved
5	Would solution to labour problems at ABC Company increase its profitability?	Instead of saying solution, candidate should have mentioned specific solution to the labour problem.
6	Would <u>non-monetary motivation</u> methods reduce <u>industrial relations problems</u> to improve <u>labour productivity</u> at ABC Company?	Good question.

Let us take this question as an example:
Would non-monetary motivation methods reduce industrial relations problems to improve labour productivity at ABC Company?

Good research question should have three important parts:

1	2	3
Method	Problem	Aim or expected result
Non- monetary motivation	Worsening industrial relations	Improve labour productivity

Furthermore a question needs to have an achievable, relevant conclusion and recommendations.

Purpose of questions

	Question	Remarks
1	Can Company XYZ introduce fringe benefits to improve employee satisfaction following recent customer service complaints?	Of course they can – no analysis really needed – questions using ‘can’ need to be used with caution
2	Would the introduction of fringe benefits at Company XYZ improve employee satisfaction following recent customer service complaints?	Structurally good, but the answer is still quite obvious and needs to be re-examined – yes, they probably would be more motivated.
3	Should Company XYZ introduce fringe benefits to improve employee satisfaction following recent customer service complaints?	Much better. Implies that it will motivate, but further investigation is needed.

Collecting primary research

As you are likely to be related to the person that you interview at your organisation, sometimes you will have informal conversations regarding the report and not document it. It is important that you document all correspondence. It is highly unlikely that you only ask 4 questions to your interviewee and get all the information that you need. To demonstrate authenticity, it is also a good idea to get the person to provide a business card or a letter on business letterhead outlining when, where and with who the interview(s) took place. **Furthermore, a letter/email on company letterhead stating that they received the final report is also NECESSARY to achieve higher grades.**

Research Proposal Orals

You will each present your research proposal as an oral presentation using a PowerPoint or Keynote. Your presentation must have at least **8 slides.** This counts 5% towards your Semester report grade and will impact your predicted grade.

Remember you cannot put every word you will say onto your slideshow. You need to add points that you will speak around more broadly. Your presentation should be at least 6 minutes, no longer than 10 minutes

<u>Example of possible slides</u>
Slide 1 – Organisation name and brief background (include visuals)

Slide 2 – Research question and rationale

Slide 3 – Areas of the syllabus to be covered

Slide 4 – Possible sources of information and the people or groups to approach

Slide 5 – Data collection methods and the plan of activities to complete

Slide 6 – Anticipated difficulties and ways to overcome these

Slide 7 – Your action plan

<u>Criterion (Just for this task)</u>

/ 1 The oral presentation was <u>coherent</u>, the slideshow was <u>appropriate</u> and the presentation ran <u>between 6-10 minutes</u>

/ 1 The background information about the business was <u>relevant</u> and <u>appropriate</u>

/ 1 The research question was <u>forward looking, not descriptive and required recommendations</u>

/ 1 A business rationale was <u>described</u> and syllabus areas selected were <u>stated</u>

/ 1 <u>specific</u> sources to collect primary and secondary data were <u>justified</u> and people to approach were <u>identified</u>

/ 1 Specific methods to collect data were <u>explained</u>

/ 1 Anticipated difficulties were <u>explained</u> and possible solutions <u>described.</u>

/ 1 An action plan was <u>prepared</u>

/ 2 You provided detailed feedback to each other speaker

Project Cover Page	The project cover page must include: - the assessment code of the student (NO NAMES), - the name of the subject and level (Business Management SL/HL), - the research question, - the assessment session (May 201X), and - the word counts.
Research proposal	The research proposal follows the Project Cover Page. No page numbers necessary
Company Letter	A letter from the company (on letterhead) acknowledging that you did prepare the report and did submit it to the business. Ideally, it should be professional and positive. If it includes your name, simply cover it somehow.

HL Written Report

The written report, which follows the research proposal, is the second part of the research project. This will document the main findings of the research.

The report must follow acceptable practice in report presentation, reflected in the required format for the written report shown below.

The written report must consist of the following sections.

Report Title Page	The Report Title Page is the cover of the report given to the business. It should be attractive and may include the logo or the organisation. It should state: - the general topic title/description, - the research question, - the name of the recipient (who it is to), and - the submission date. Your name must not be included. Depending on the business, they may wish to remain anonymous. This includes the cover page.
Acknowledgements	The acknowledgements should recognize any individual and/or organization that made the production of the report possible. Do not stress about this – just get it done
Contents Page	The contents page should include the major headings in the report, beginning with the executive summary, ending with the appendices. Page numbers should be clearly indicated.
Executive Summary (Abstract)	The executive summary should be a concise, clear and explicit summary of the document, including the conclusions and recommendations. The research question and executive summary should guide the reader to the substance of the report. The maximum length of the executive summary is **200 words**, and this is **NOT** included in the report word count. These 200 words are extra. They are not included in the 500 words for the research proposal or the 2,000 words for the written report. State the word count at the endof it. The reader should be able to read this part and know everything you did – from the beginning until the end. Therefore, it is the last thing you will write. It is recommended that the executive summary include the following elements (no headings): - the research question and brief rationale - the scope of the research (brief methodology) - the main findings - the conclusion - the recommendations (brief bullet points).

Introduction	The introduction should demonstrate some background knowledge about the organization(s) and give a clear outline of the issue or decision under investigation. Briefly outline the issue. This is NOT a history of the company. Include a hook – a connection to the rationale in the research proposal that makes this worth reading. Remember, the research proposal is a completely separate document to this report. End with: This has therefore led to the following research question: Put your title at the end of your introduction.
Research question	See Introduction. This is your title and is to be written at the end of your introduction. Make it stand out.
Methodology Employed	The methodology section should be a summary of the primary (and, where relevant, secondary) research undertaken and the business tools, techniques and theories applied. It should also include an assessment of the validity and reliability of the data collected (for example, partiality and scope) and the methods employed. Any changes made as the work progressed should be explained. It needs to be in sentences, but you can break it down into steps. - What primary/secondary sources were used - Make it clear you had more than one source – identify them clearly by type (e.g. surveys, observations and interviews) - Very briefly – describe a benefit of using the source - If completing a survey or something involving a sample, explain how the sample was created. - What business tools have been used to analyse the data and why - Recognise genuine limitations of the research and the approach taken. If you had the chance to do this again, what would you change and why? This should be the starting point for the final criterion I (Reflective thinking). Remember, this is a completely separate document to the research proposal. Your research proposal was in future tense. This section is in past tense.
Main results and findings	The main results and findings section should clarify what the raw data has revealed. This should include a summary of the data collected and of the findings made, and should, where appropriate, be supported by tables, graphs and statistics. It does not need to include the results to every survey question. The title is 'main' results and findings. Summarize data into tables or graphs when possible. This will form the basis of your analysis later. If it is here, it MUST be analysed later There should be NO analysis here. It is purely your results summarised. Therefore, there should also be **lots of referencing** as the sources are either the appendix (primary sources) or from some secondary sources. Use MLA. If the primary source data in the appendix is not cited in the report, then it does not exist! If you include a SWOT, PEST, Fishbone or other similar analytical tools, they can be used here. They must be fully referenced.

Analysis and discussion

In the analysis and discussion section, the results and findings should be analysed with the help of relevant business tools, techniques and theories.

Firstly, understanding of the tool, technique or theory should be displayed (definition or description with reference to the RQ). It is not about how many tools/techniques/theories you choose. Make sure you choose the most appropriate that enable you to analyse and evaluate your findings within the word count. However, it is a plural, so there should be use of at least 2 business tools with a maximum of 3, as well as techniques and theories.

They should also be interpreted: what main issues emerge from the research, and why and how are they helpful (or not) to answering the research question?

You are not trying to 'solve' the problem in one paragraph. You are trying to make sense of the data, by using business tools and relating it to business theory. It should also be made in the context of the real business. Be nuanced and thoughtful, and not generic or a propagandist.

An evaluative approach to the discussion of findings should be pursued: for example, what are the strengths and weaknesses of the various positions on the issue or decision under investigation and what are their implications?

This is the most important part of your report. This is NOT the time to have lots of graphs and charts. This is a DISCUSSION of your findings.

Look at effects, causes, solutions (The IMPACT).

Consider the needs of the business.

Consider alternatives.

Consider limitations of the theory or tool.

- The discussion should be well referenced.
- There should be evidence of interpretation of information from the **main findings.**

To get the highest mark in your analysis, your discussion has to be probing, in-depth and informative. Your ideas have to be integrated well and the issues you are discussing have to have a logical and coherent order. There has to be consistent evidence of critical.

You can use sub-headings. Each heading should build a mini-argument with a small conclusion. These small conclusions are important later.

Conclusion and Recommendations	You should have one heading, but have two clearly separated parts for conclusions and recommendations The conclusions should follow on from the analysis and discussion; new facts or arguments should not be presented. Recommendations should be precise, answer the research question and be practical proposals for action that stem from the conclusions. Answer the initial research question clearly and explicitly. Your final conclusion does not have to be 'correct', but it must be supported by the previous analysis and evaluation in the analysis section. You should be relying on the mini conclusions made along the way. If you feel you are repeating main findings, this means you are restating facts, which makes your conclusion weaker. It should be mostly relying on the judgments made during the analysis, synthesising them together to paint the big picture Your conclusion should be limited based on earlier limitations in the approach to your project identified in the methodology section (Important for Crit I). If the results of the research are inconclusive, further research should be recommended. There is no IF! You MUST advise of further SPECIFIC research to complete. This happens in the recommendations. To be of practical value to management, the report should be forward-looking and support the organization's decision-making process. This means your recommendations (have more than one + further research areas needed) should be useful and relevant to their current issue or decision to be made. They should also be substantiated and not just be a last minute idea that you had. - Did the recommendations answer the research question? - Were they consistent with the conclusion? - Were they substantiated? They should be specific about the next steps and go beyond the research question. For example, if the RQ asked 'should they…', then the recommendation is not just 'yes they should', but what they should or should not specifically do. They do not have to be spectacular, large plans – just the next steps. Substantiated often means that the financial implications of the recommendation have been considered (can they afford it?).
References and bibliography	For presentation of references and bibliography, please see the section on acknowledging the ideas and work of another person in the "The Diploma Programme" section of this subject guide. You must use an approved style and be consistent in that style throughout your whole report. Remember to reference your appendices too if making a claim based in primary research – there are styles for observations, interviews etc.

Appendices	The appendices should contain only information or data that is required to support of the text and should be clearly referred to where relevant. The appendices will typically include examples of photographs, documents, questionnaires, numerical raw data in tables and statistical calculations. Often the most misunderstood part of the report. This is where you add information that you need to reference, but are not able to write the citation as the information does not exist anywhere else. If you find a table or a graph in a secondary source, you can use it in your report and reference it, but it does not need to be added to the appendix. If you collate the results of your own survey into a graph and use the graph in your report, it needs to be referenced to the appendix where the raw data needs to be shown, as this is the only place that this information can be accessed from. The appendix should NEVER be referred to, such as 'see appendix'. There is no obligation for the examiner to read it, other than to check a source of information.

Business Tools that can be used

The following is a list of subject prescribed analytical tools that you should consider:

- Ansoff’s Matrix
- Break-even analysis
- Cash flow forecasting / statements
- Cost to make Vs Cost to buy
- Decision trees
- Financial accounts / ratio analysis
- Fishbone diagram
- Investment appraisal
- Lewin’s Force field analysis
- Perception mapping
- Sales forecasting
- Stakeholder analysis
- STEEPLE analysis
- SWOT analysis
- The BCG Matrix
- Variance analysis

Remember it is about quality vs quantity – if using a visual tool in the analysis, introduce it, show it, add analysis if necessary, and make a mini conclusion. Many of these tools will also need referencing – if you add a strength of a business, you need to reference where the information came from. Likewise, if you apply a number using a force-field analysis, there needs to be substantiation for it. Ideally, 2 to 3 tools included in your analysis.

Word Count

The written report must not exceed 2,000 words. A word count must be included as part of the written report. If the word limit is exceeded, the teacher’s assessment must be based on the first 2,000 words of the report.

NOTE:- moderators will not read beyond 2,000 words for the written report

The following are **not** included in the 2,000-word count:

- Report title page
- acknowledgments
- contents page
- executive summary (abstract)
- tables of statistical data
- diagrams or figures
- equations, formulae and calculations
- citations (which, if used, must be in the body of the commentary)
- references (which, if used, must be in the footnotes/endnotes)
- bibliography
- appendices.

Please note that footnotes/endnotes may be used for references only. Definitions of business management terms and quotations, if used, must be in the body of the work and are included in the word count. Please note that citation is a shorthand method of making a reference in the body of the commentary, which is then linked to the full reference in the bibliography.

<u>Suggested word count…</u>

Introduction:	200 words
Methodology employed:	200 words
Main results & Findings:	200 words
Analysis and Discussion:	1000 words
Conclusion and recommendations:	400 words.

The above is a suggestion only – and you may wish to change it, as long as your report does not exceed 2,000 words.

FINAL THOUGHTS

- Quality of Language: Spelling, punctuation, terminology and grammar.
- Presentation: You can have photographs, tables, graphs, diagrams.
- Report structure: word processed, page numbers, fully referenced, bibliography.
- Have the same header/footer for each page with logo, or company's name etc, to show the presentation is well thought out.

  AND finally IMPORTANTLY

- **Actually give a copy of your final report to the organisation and gather their feedback (get a letter/email from them, on company letterhead, stating you did all of the work). This must be added to your submission to the IBO.**

HL research project Criteria

The HL business management research project is assessed against nine criteria that are related to the assessment objectives for the business management course. Criterion A refers to the research proposal, while criteria B–I are used to assess the written report.

When the work to be assessed has been read, the descriptors for each criterion should be studied until a descriptor is reached that most appropriately describes the achievement level. If a piece of work seems to fall between two descriptors, both descriptors should be read again and the one that more appropriately describes the student's work chosen.

There are nine assessment criteria for the research project.

- Criterion A: Research proposal
- Criterion B: Sources and data
- Criterion C: Use of tools, techniques and theories
- Criterion D: Analysis and evaluation
- Criterion E: Conclusions
- Criterion F: Recommendations
- Criterion G: Structure
- Criterion H: Presentation
- Criterion I: Reflective thinking

Criterion A: Research proposal

Please note: Criterion A should be used to assess the research proposal only.

This criterion assesses the extent to which the student presents a research proposal that gives an effective direction for the project, with all the required elements

Marks	Level descriptor
0	The work does not reach a standard described by the descriptors below.
1	The research proposal is presented but is generally inappropriate, or two or more elements are missing.
2	The research proposal is generally appropriate but some elements lack clarity, detail and focus, or one element is missing.
3	The research proposal with all the required elements is appropriate, detailed, clear and focused.

Criterion B: Sources and data (written report)

This criterion assesses the extent to which the student selects primary sources and collects data which address an issue or a decision to be made by an organization or a range of organizations in appropriate depth and breadth.

Marks	Level descriptor
0	The work does not reach a standard described by the descriptors below.
1	Some of the primary sources selected or the data collected are appropriate.
2	The primary sources selected and the data collected are appropriate, but are not varied and sufficient.
3	The primary sources selected and the data collected are appropriate, varied and sufficient.

Criterion C: Use of tools, techniques and theories (written report)

This criterion assesses the extent to which the student understands and applies relevant business management tools, techniques and theories so that a greater insight into the situation of the organization ensues.

Marks	Level descriptor
0	The work does not reach a standard described by the descriptors below.
1	There is a limited understanding of business management tools, techniques and theories, and these are not applied or are superficially applied.
2	There is a satisfactory understanding of relevant business management tools, techniques and theories, and these are suitably applied.
3	There is a good understanding of relevant business management tools, techniques and theories, and these are skillfully applied.

Criterion D: Analysis and evaluation (written report)

This criterion assesses the extent to which the student uses his or her results and findings effectively in order to explain the issue or decision to be made and is able to integrate his or her ideas coherently. This criterion also assesses the extent to which the student evaluates his or her arguments and makes judgments that are well substantiated.

Marks	Level descriptor
0	The work does not reach a standard described by the descriptors below.
1	The results and findings are limited, and no analysis of them is provided.
2	The results and findings are limited, and a superficial analysis of them is provided.
3	There is a satisfactory analysis of the results and findings and some integration of ideas.
4	There is a satisfactory analysis of the results and findings, a satisfactory integration of ideas and some evidence of evaluation.
5	There is a good analysis of the results and findings, a good integration of ideas and evidence of substantiated evaluation.
6	There is a skillful analysis of the results and findings, a coherent integration of ideas and consistent evidence of substantiated evaluation.

Criterion E: Conclusions (written report)

This criterion assesses the extent to which the student is able to draw relevant conclusions based on the analysis of the report.

Marks	Level descriptor
0	The work does not reach a standard described by the descriptors below.
1	There are some conclusions, but they are unsubstantiated and/or inconsistent with the evidence presented in the main body of the report.
2	Conclusions are substantiated and consistent with the evidence presented in the main body of the report.

Criterion F: Recommendations (written report)

This criterion assesses the extent to which the student is able to make substantiated recommendations that are consistent with the conclusions made and answer the research question.

Marks	Level descriptor
0	The work does not reach a standard described by the descriptors below.
1	There are recommendations, but they are unsubstantiated and/or inconsistent with the conclusions, or they do not answer the research question.
2	The recommendations are substantiated and consistent with the conclusions, and they answer the research question. Areas for further study have been identified..

Criterion G: Structure (written report)

This criterion assesses the extent to which the student organizes his or her ideas into a structured report with an argument that is easy to follow.

Marks	Level descriptor
0	The work does not reach a standard described by the descriptors below.
1	Limited structure.
2	Appropriate structure.

Criterion H: Presentation (written report)

This criterion assesses the extent to which the student presents all the required components of the written report in the correct order and format.

Marks	Level descriptor
0	The work does not reach a standard described by the descriptors below.
1	The report is missing one or more of the required components, or the components are not in the correct order or format.
2	The report includes all of the required components in the correct order and format.

Criterion I: Reflective thinking (written report)

This criterion assesses the extent to which the student is able to reflect critically on their own work.

Marks	Level descriptor
0	The work does not reach a standard described by the descriptors below.
1	The report includes limited or superficial reflective thinking on the approach taken in this piece of research and its limitations.
2	The report includes appropriate evidence of reflective thinking on the approach taken in this piece of research and its limitations.

BM – Internal Assessment (IA) Checklist for HL

Criterion	Mark	Level Descriptor	Subject Report Comments	Checklist	☑
Criterion A – Research proposal	0	No research proposal	RP is placed before the report Rationale is business focused, not personal Action plan 'table' is included in word count Action plans that include amendments are better Anticipated difficulties are genuine, and solutions appropriate	Cover page first Research proposal is at front of the report – no page numbers needed. Report title page is after RP Rationale is business focused 500 words includes action plan 'table' Amendment to AP are added in pen All headings of RP are included	
	1	Research proposal is inappropriate or missing many parts			
	2	Research proposal generally appropriate, lacking clarity or missing one part			
	3	Research proposal is complete, detailed, clear and focused.			
Criterion	Marks	Level Descriptor	Subject Report Comments	Checklist	☑
Criterion B – Sources and data	0	No primary data, or it is inappropriate	Need to go beyond partial views of owners or managers Surveys/questionnaires need appropriate sampling Samples need to represent the market demographic Should be checked against secondary data when applicable	Complete primary data is included in the appendix and is dated and translated where necessary More than just 1 interview has been used. Also outside manager considered. For surveys, the sample method and size has been considered Secondary research used to support and extend primary	
	1	Some of the primary data selected or collected is appropriate			
	2	The primary data selected or collected is appropriate, but lack in variety and sufficiency			
	3	The primary data selected or collected is appropriate, varied and sufficient			
Criterion	Marks	Level Descriptor	Subject Report Comments	Checklist	☑
Criterion C – Use of tools, techniques and theories	0	No understanding of business TTT	SWOT and PEST overused. Make sure to apply SWOT to whole business, not to a strategy or person Force Field overused – numbers need objectivity Need broader range of tools Need quantitative tools ($$)	Has SWOT (or similar) been used appropriately? Has the SWOT (or similar) been fully referenced? Have I used an additional tool (or more)? Have I made quantitative analysis?	
	1	Limited understanding of TTT, superficial application			
	2	Satisfactory understanding of TTT, suitably application			
	3	Good understanding of TTT, Skillfully application			

Criterion	Marks	Level Descriptor	Subject Report Comments	Checklist	☑
Criterion D – Analysis and evaluation	0	There are no results and findings	Need to analyse the significance of the findings and business tools towards answering the RQ, not just describe the outcomes of using the business tools. Show critical thinking Integration of ideas, not just the presentation of discrete pieces of information	Have I put forward appropriate research and findings from the primary data? Have I used the results and findings together with business tools, techniques and theories to explain the results? Have I analysed the significance of these results towards answering the RQ? Have I shown critical thinking – not just accepting the answer provided, but examining its flaws and limitations? Have I combined the outcomes from different tools and theories together to build stronger arguments?	
	1	Results and findings are limited, no analysis performed			
	2	Results and findings are limited, superficial analysis performed			
	3	Results and findings are appropriate, satisfactory analysis performed, some integration of ideas			
	4	Results and findings are appropriate, satisfactory analysis performed, satisfactory integration of ideas, evidence of evaluation			
	5	Results and findings are appropriate, good analysis performed, good integration of ideas, supported evaluation			
	6	Results and findings are appropriate, skillful analysis performed, coherent integration of ideas, consistently supported evaluation			
Criterion	**Marks**	**Level Descriptor**	**Subject Report Comments**	**Checklist**	**☑**
Criterion E - Conclusions	0	No conclusions	Different sections for conclusions and recommendations Do not introduce new information here	Do I have separate headings for conclusion and recommendations No new information in the conclusion	
	1	Conclusions have no evidence to support, inconsistent with body of report or not relevant for research question			
	2	Conclusions have evidence to support, are consistent with body of report and relevant for research question. Areas for further study are identified			
Criterion	**Marks**	**Level Descriptor**	**Subject Report Comments**	**Checklist**	**☑**
Criterion F - Recommendations	0	No recommendations	Recommendations follow the conclusions Recommendations answer the RQ Recommendations were	Do the recommendations follow the ideas of the conclusion? Do the answer the RQ Is there evidence to	
	1	Recommendations have no evidence to support, inconsistent with conclusions or not relevant for research question			

	2	Recommendations have evidence to support, are consistent with conclusions and relevant for research question	substantiated earlier in the report body Recommendations should be costed and represent realistic and within financial capabilities of the business. Identify further areas of study	substantiate provided earlier in the report? Are the recommendations costed? Are they realistic and financially possible?	
Criterion	Marks	Level Descriptor	Subject Report Comments	Checklist	☑
Criterion G - Structure	0	Argument not clear, no clear structure		Use of sub headings within the report Paragraphs are clear written Order of arguments is clear and makes sense	
	1	Structure limited, argument somewhat clear			
	2	Appropriate structure, argument easy to follow			
Criterion	Marks	Level Descriptor	Subject Report Comments	Checklist	☑
Criterion H - Presentation	0	Poor presentation – many omissions	RP must go before the title page of the report!! Must have all headings, explicitly (title page, table of contents, executive summary, intro, methodology, main results and finding, analysis and discussion, conclusion, recommendations, bibliography, appendix) Appropriate executive summary Proper style bibliography Need adequate referencing	RP must go before the report title page Include company letter between RP and report title page!! All headings, explicitly (title page, acknowledgement, table of contents, executive summary, intro, methodology, main results and finding, analysis and discussion, conclusion, recommendations, bibliography, appendix) Executive summary appropriate and 200 words maximum (show word count at bottom) and includes the RQ, methodology, conclusion and recommendations in the past tense. Report Title page shows word count for report (max 2000 words) Bibliography alpha order proper style All main ideas are referenced. Primary data cited to appendix sources. Did not use appendix to present important information	
	1	Missing components required or incorrect order			
	2	All components complete and in correct order			

Criterion	Marks	Level Descriptor	Subject Report Comments	Checklist	☑
Criterion I – Reflective thinking	0	No reflective thinking	Should be in report, not in RP Should be throughout report, although a separate subheading can be created Should be on the approach taken in the research process and the limitations of the research	Have I identified possible limitations of the research process in the methodology section? Have I recognized a research limitation in the analysis of one idea in the body of the report? Have I considered the implication of my research limitation to the validity of the conclusion?	
	1	Limited or superficial reflective thinking about the research and the limitations			
	2	Appropriate reflective thinking about the research and the limitations			

Potential frameworks for HL IA research reports.

Following your preliminary interviews and collection of other primary data, you might find that one of the suggested topic is similar to yours. Most of the recommended tools are specific to the question, often overlooking some possible financial tools. If there is no specific financial tool mentioned, it is always wise, if possible to perform some relevant ratio analysis in order to determine the feasibility of spending money on something. Gearing ratio measures ability to obtain loans. Current ratio measure ability to use internal cash.

Review the suggestions and discuss with your teacher.

1. **Improve the physical environment of the business due to poor customer reviews or increased competition**

   Always need a detailed interview with management

   Fishbone diagram – use the research to determine the main reasons for the poor customer reviews. Complete a survey and use online sources of information, like TripAdvisor. Also complete an employee survey. Make sure questions are specific and relevant, and sampling method is considered.

   Perception map – analyse competitors. Use online sources as well as complete your own observations about selected criterion of the competition

   Force field analysis – driving and restraining forces for making the change. This will include quantitative data, such as the costs or expected changes in revenues of making the change.

2. **Improve the product portfolio of the business to improve customer experience given falls or stagnant sales revenue**

   Fishbone diagram – use the research to determine the main reasons for the poor customer reviews. Complete a survey and use online sources of information, life TripAdvisor. Also complete an employee survey. Make sure questions are specific and relevant, and sampling method is considered.

   Perception map – analyse competitors. Use online sources as well as complete your own observations about selected criterion of the competition Can come from customer surveys too.

   Boston Matrix – analyse each product for its popularity with the restaurant and its popularity based on current trends – this will be based on the interview and focused customer survey questions

3. **Business with HR issue – lack of motivation causing high turnover or customer complaints**

   Fishbone diagram to determine causes of demotivation

   Investigate costs of training

   Create an organisational structure chart – analyse for channels of communication and promotion opportunities

   Research the costs of labour and possible financial rewards that can be made available

   Observe the workplace for how non-financial rewards are made available, such as teamwork or job rotation etc.

   Apply at least one motivation theory

4. **Purchasing a new fixed asset for the business**

   Investment appraisal for the asset – what benefits will it create. ARR and payback period and NPV.

   Force field analysis – driving and restraining forces for purchasing the asset

   Ratio analysis – to investigate possible sources of finance to purchase the asset in the first place.

5. **Poor cash flow, business struggling with high debtors problem, struggling to pay wages or creditors**

   Ratio analysis – determine financial weaknesses

   STEEPLE Analysis – investigate if any external factors are influencing the cash flow issues

   Cash flow forecast – determine whether the business will have enough cash for the upcoming 6 months – 1 year.

6. **Growth strategies in order to survive, increase market share**

   Ansoff matrix – possible growth options

   Sales forecasting – benefits to revenue of taking a strategic option

   Ratio analysis – determining possible sources of finance

   Perception mapping – finding out customers perceived opinions of the business

   SWOT – situational analysis before taking the growth option.

General Observations on the BM IA from the Subject Reports

Report word count "intro to end of recommendations" is 2000 words. Executive summary is 200 words and research proposal is 500 words (including action plan 'table'.

Tools, techniques and analysis in the appendix will not be assessed. This is just the place to store your interviews, survey data etc – information that cannot be found anywhere else.

Rationale in RP should be business focused, not personal. Remember you are the business consultant completing the report on the business's request

Table of contents should not indicate RP or action plan

Format should strictly follow IB requirements

Main results and findings should not include analysis. Any text, graphs, table or other data should be referenced.

Go beyond SWOT and PEST for business tools

Make sure any visual tools or diagrams are well labeled and titled and properly referenced

Show critical and reflective thinking throughout the report.

Reference appropriately

Identify potential costs and recommend actions

Grade yourself prior to submitting

Executive summaries are summaries of the whole report in the past tense

Include comments (such as letter or email) from the organisation that they received the report as evidence it was submitted to them