



MBA 640 Module Two Financial Model Guidelines and Rubric

Overview: The financial model assignment will give you an opportunity to explore the company you will be using for your final project and it will also give you practice in creating a simple spreadsheet. You will be expected to utilize spreadsheets as exhibits in your final project external capital funding proposal.

Prompt: Choose one of the following companies, which you will use in your final project proposal:

1. [Alteryx](#)
2. [L.S. Starrett Company](#)
3. [Nordstrom, Inc.](#)

Draft a one-page spreadsheet showing financial history and projected performance for the company you have chosen. The rows should include revenue, expenses, calculated profit, and calculated profit margin. The columns should be years: two years of history, plus three years of your reasonable future projections. Include a few sentences of key assumptions and conclusions. The spreadsheet must have accurate calculations and the cells of the spreadsheet should show your calculation formulas. Your spreadsheet should look professional on screen and when printed (including a heading and meaningful number formatting). Submit this assignment as an Excel spreadsheet file, not a PDF document.

Specifically, the following critical elements must be addressed:

- Show two years of financial history including revenue, expenses, calculated profit, and calculated profit margins.
- Show three years of future financial projections for revenue, expenses, calculated profit, and calculated profit margins.
- Show calculation formulas in cells where appropriate rather than “inputting” numbers.
- Identify key assumptions and conclusions regarding financial projections.
- Present data in a professional manner with headings and meaningful number formatting.

Help with Excel Spreadsheet

[Atomic Learning Excel Spreadsheet Tutorials:](#) Atomic Learning provides Excel tutorials at various levels (beginner, intermediate, advanced) and for various software versions. Log in using your SNHU login credentials, type “Excel” into the search box, and choose the tutorial that is right for you.

Guidelines for Submission: Your financial model must be submitted as an Excel spreadsheet document.

Rubric

Critical Elements	Proficient (100%)	Needs Improvement (75%)	Not Evident (0%)	Value
Financial History	Shows two years of financial history including revenue, expenses, calculated profit, and calculated profit margins	Shows two years of financial history but calculations are inaccurate	Does not show two years of financial history	20
Financial Projections	Shows three years of future financial projections for revenue, expenses, calculated profit, and calculated profit margins	Shows three years of future financial projections, but calculations are inaccurate	Does not show three years of future financial projections	20
Calculations	Cells accurately reflect calculation formulas	Cells inconsistently reflect calculation formulas	Cells do not reflect calculation formulas	20
Key Assumptions and Conclusions	Identifies reasonable key assumptions leading to logical conclusions	Identifies key assumptions, but assumptions are not reasonable and/or conclusions are not logical	Does not identify reasonable key assumptions leading to logical conclusions	20
Presentation	Spreadsheet is presented cleanly and professionally with proper headings, spacing, and number formatting	Spreadsheet has minor problems with professional appearance, spacing, heading, and formatting	Spreadsheet has major problems with professional appearance, spacing, heading, and formatting	20
Total				100%