



# ORAL PRESENTATION OVERVIEW

## Rubric & Scoring Elements

Each element will be rated from 1 to 5 stars. A score of five is outstanding and a score of one needs significant improvement.

ELEMENT	JUDGING CRITERIA	TASK ALIGNMENT
<b>Company Overview and Financial Highlights</b>	<p><i>How well does the company provide an overview of the business and relevant financial highlights from the year thus far?</i></p> <p>The company overview should include</p> <ul style="list-style-type: none"> <li>• A brief description of the company and its business</li> <li>• An overview of the company's financial performance. Highlights may include: sales totals and breakdowns (by geography and/or type), net income, profit margins, ratio analysis, etc.</li> <li>• Graphs and charts to visually present this information</li> </ul>	FIN-2 FIN-12
<b>Break-Even Analysis:</b>	<p><i>How well does the company understand and execute the Break-Even analysis?</i></p> <p>The Break-Even analysis should:</p> <ul style="list-style-type: none"> <li>• Be presented in terms of total dollars and number of sales</li> <li>• Provide details about assumptions used to perform the analysis including the profit margin percentage.</li> <li>• Assume that all costs are fixed except for cost of goods sold. Fixed expenses should tie to the Income Statement.</li> </ul>	FIN-8
<b>Balance Sheet</b>	<p><i>How well does the company understand and execute the Balance Sheet?</i></p> <p>The Balance Sheet should reflect:</p> <ul style="list-style-type: none"> <li>• The date applicable for the specific submission date (i.e. Dec. 15<sup>th</sup> submission would be a Nov. 30<sup>th</sup> balance sheet date</li> <li>• Cash reported on the balance sheet should reconcile with the ending cash balance reported on the Cash Budget</li> <li>• Cash reported on the balance sheet should match with the ending cash balance shown on the screenshot of the firm's bank account details</li> <li>• Balance sheet should also include fixed assets, depreciation, loan payable (if applicable), common stock, and retained earnings</li> </ul>	FIN-7
<b>Income Statement</b>	<p><i>How well does the company understand and execute the Income Statement?</i></p> <ul style="list-style-type: none"> <li>• Provide a multiple-step income statement for the months aligned to the submission date</li> <li>• The summary P&amp;L should include total revenue, total cost of goods sold, total gross profit, gross margin %, total operating expenses, and net income (loss)</li> <li>• Sales totals should be broken out as VE sales (web or direct), trade show sales, or out-of-network sales</li> <li>• Actual figures through Nov. 30<sup>th</sup> for the Dec. 15<sup>th</sup> submission, with projections through Apr. 30<sup>th</sup></li> <li>• Firms have the option to provide details in relation to expense categories by showing the breakdown of the expenses and footnotes</li> </ul>	FIN-10
<b>Cash Budget</b>	<p><i>How well does the company understand and execute the Cash Budget?</i></p> <p>The cash budget should provide line-by-line detail of all receipts and payments of cash for the months indicated above. Each month should include beginning and ending balances along with net cash flow for the month.</p>	FIN-11 FIN-14 ACCT-12
<b>Quality of Presentation</b>	<p><i>How well does the company present the material?</i></p> <p><b>Organization:</b> Presentation content is organized in a logical way. <b>Delivery:</b> Presenter(s) speak clearly, articulately, with appropriate voice projection and eye contact. <b>Appearance:</b> Presenter(s) are dressed professionally and display appropriate body language. <b>Composure:</b> Presenter(s) are poised and display confidence. <b>Efficacy:</b> Presentation is engaging and effective.</p>	
<b>Q&amp;A</b>	<p><i>How well does the team answer questions based on the presented materials?</i></p> <p>Are they able to effectively answer your questions? Are they able to provide additional context or clarity that enhances the information presented? Are their responses consistent with the information that was presented?</p>	