



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
Company Overview	<p><i>How well does the company provide an overview of the business?</i></p> <p>The company overview should include a brief description of the company and its business. This should include:</p> <ul style="list-style-type: none"> • Company history – when was the company formed? What is the corporate structure and why was this corporate structure chosen? How many employees are in the firm? • Products/Services – what are the key products/services? • Other – what are some material comments or changes that occurred since the firm launched? 	BR-1 MRK-1 MGT-5
Quarterly Financial Reports	<p><i>How well does the company understand and execute the Profit and Loss Report and Balance Sheet?</i></p> <p>Prepare a profit and loss report and a balance sheet as of the most recent fiscal quarter (November 2020-January 2021). Present 3 key financial results achieved by the business to date as seen in the balance sheet and profit and loss statements. The profit and loss statement should include the last month of the most recent fiscal quarter and the year-to-date amounts through the most recent fiscal quarter. Points are earned for correctness of the documents and the overall selection and explanation of the 3 key financial results.</p> <ul style="list-style-type: none"> • Were the reports prepared correctly and as requested? • Were three financial results presented and explained and the rationale for selection explained and reasonable? • Was adequate explanation provided for the highlighted results? 	ACCT-2 ACCT-3 ACCT-4 ACCT-5 ACCT-6 ACCT-11
Bank Reconciliation Preparation and Review	<p><i>How well does the company understand and execute the bank reconciliation process and review?</i></p> <p>Describe the purpose of the bank reconciliation. Explain the common reconciling items found on most bank reconciliations. Using your bank reconciliation as prepared for the month of January, discuss the specific reconciling items listed and if these are normal or abnormal.</p> <ul style="list-style-type: none"> • Was the proper bank reconciliation report provided? • Were reconciling items such as outstanding checks and deposits in transit properly explained? • Were any abnormal reconciling items noted and explained? 	ACCT-7 ACCT-12
Internal Controls	<p><i>How well does the company understand and implement internal controls in their Accounting and Finance department?</i></p> <p>Provide an overview of the firm's accounting workflow and reflect management practices that ensure oversight and internal controls in the firm's finance and accounting operations. Topics should include:</p> <ul style="list-style-type: none"> • Account access – who has access to the QBO account? How is this decided and monitored? • Training – how does each member of the department develop the necessary skills to use QBO? • Separation of duties – how are roles distributed to each member of the department? How do you ensure oversight of roles and responsibilities? • Reconciliations – how does the firm ensure transactions reported match the transactions in the bank account? What is the process to ensure accuracy of the financial figures presented? 	ACCT-1 ACCT-8 ACCT-9 ACCT-10 ACCT-13 ACCT-14
Quality of Presentation	<p><i>How well does the company present the material?</i></p> <ul style="list-style-type: none"> • Organization: Presentation content is organized in a logical way. • Delivery: Presenter(s) speak clearly, articulately, with appropriate voice projection and eye contact. • Appearance: Presenter(s) are dressed professionally and display appropriate body language. • Composure: Presenter(s) are poised and display confidence. • Efficacy: Presentation is engaging and effective. 	
Q&A	<p><i>How well does the team answer questions based on the presented materials?</i></p> <ul style="list-style-type: none"> • 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? 	