



Consultancy Management

Project Assignment 2018



**Topic: What are the successful factors
of Vitasoy?**

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In this case study, the topic is “What are the successful factors of Vitasoy?”

➤ **Company History & Founder**

Vitasoy, a well-known brand over Hong Kong and China. It was founded in 1940 by Dr. Kwee Seong Lo, who brought the soymilk from this healthy little bean to a wider market. In 1939, Dr. Lo was volunteering to join a refugee camp for people fleeing the civil war in China. He discovered that many of the refugees were suffering from malnutrition. Dr. Lo bought a stone grinder, soybeans, sugar and cheesecloth to teach the refugees how to make soy milk. The name of “Vitasoy” is derived from the words vitamin and soya.

The development and history of Vitasoy can be traced back to Hong Kong Soya Bean Products Limited founded by Dr. Lo in 1939, which is now the Vitasoy International Group Limited. Soya Bean's factory is located at Great George Street in Causeway Bay. At the beginning of the company, it was only a single product for large-scale production of Vitasoy and did not produce other beverages. The company's daily production, operation and sales business were handled by Dr. Lo and his brother Mr. Lo Fong Seong.

The process of making Vitasoy was a streamlined operation and a specialized production model. Each worker only responsible for a certain production process.



First, the workers washed the soybeans at 9pm every night and then soaked in water. In the morning, the soybeans were ground into soy milk using a grinder. Until 5am, another group of workers burned coal to start a steam machine to cook soy milk. A power-driven canvas filter is placed next to the steam engine. The following step is controlling and filtering the soy milk residue from the steam machine to ensure that the Vita milk is fresh and smooth. When the soy milk is boiled and filtered, add sugar, milk powder and vegetable oil to become the beverage Vita milk. When Vitasoy is made, a pre-sterilized glass crucible is injected through a row of cooling tubes and the lid is pressed out. Finally, the workers in charge of the packaging put the Vitasoy in the bamboo basket. Each bamboo basket can hold 72% of the Vitasoy, and then it can be delivered to the subscriber's door by delivery man or sent to Lingying Secondary School in Lee Garden for sale.



In 1953, Vitasoy started to adopt sterilization technology of soymilk drinks. It made the drinks can be stored without refrigeration, so therefore they grown the distribution and revolutionized the business. In 1975, it was the first time that a Hong Kong Company to use Tetra Pak packaging technology for drink production, to ensure the drink products can be kept more than a months in normal atmospheric temperature. In the next year, Vitasoy developed a new VITA line of juice drinks. It



was the first ready-to-drink VITA lemon tea in the world. In 1994, Vitasoy became a household name and a listed company (0345.HK) on the Stock Exchange of Hong Kong. Vitasoy went into China market since 2006 under CEPA and start its new development.

➤ **An icon of Hong Kong**

As a beverage brand, Vitasoy has what it takes to become a successful commercial product. To the people of Hong Kong, Vitasoy is not just a brand of soya milk. As a matter of fact, consumers have almost forgotten that Vitasoy is soya milk. Vitasoy is Vitasoy. It is a category all of its own. A beverage with distinct image, Vitasoy is also something many people grew up with; an object that commands special feelings. If Coca Cola is an icon of American culture, youthfulness and vitality, then Vitasoy is clearly something born and bred in Hong Kong. Just like the Peak, Lion Rock and the cross-harbour ferry, it symbolizes the Hong Kong way of life. To Hongkongers away from home, all these impressions of the city evoke emotions of yearning.

Over the years, Vitasoy has become an iconic Hong Kong brand while also expanding beyond soy milk drinks. Today, the company's product range includes tofu, juices, coffee, teas and water. Their products are now stocked by stores and supermarkets in over 40 countries around the world. They also expanded early into Mainland China, a region which now contributes nearly half of the group's revenue. It is therefore one of the relatively few Asian consumer brands to have successfully evolved from a domestic to a regional to an arguably global champion.

Vitasoy intends to sustain its leadership to promote a high quality of life by producing good quality, nutritious and wonderful tasting products which can satisfy



the needs of customers. The aim of the company is promoting well-being among consumer by healthy and innovative products. Their strategy of “Sustainable Growth” has enabled them to gradually expand their core business and consistently develop innovative new products to meet ever evolving consumer demands in existing markets.

Vitasoy comply with consumer’s needs and lifestyle by constantly improve its products with new ideas, including its promotion method and channels. For many Hong Kong people, Vitasoy is part of the process of personal growth. Most of the people have a special sense of intimacy and identity with Vitasoy.

➤ **Memorable Slogans**

Although the company can rely on the working class and students to purchase Vitasoy to maintain the company's income. But when the cost of raw materials and transportation is rising, it is not enough to rely on the working class and the student group. In order to continue rising funds and maximize profits, Vitasoy began to publish different types of advertisements in the 1940s, aiming at opening up groups and regions of consumers. The special feature of Vitasoy advertisement is to conceive different slogans according to the context and environment of Hong Kong society. The first advertisement for Vitasoy was a newspaper printed advertisement with the slogan "One penny three points worth: nutrition + hunger + thirst" to assure consumers that fresh Vitasoy contains high nutrition and the ingredients that fill the hunger and can be delivered to the consumer's home on time. Until the 1950s and 1960s, when the Hong Kong society faced the post-war baby boom and economic downturn, Vitasoy launched a TV commercial "Vitasoy makes you higher." Vitasoy



makes you stronger! Vitasoy makes you more fit!" was a slogan that advertised the nutritional value of its products.



Since 1970s, it tries to establish an image of consumer product for young people because Vitasoy understand the youngsters is the biggest market. A series of TV commercial come behind. Every slogan is easy to remember. "Not just a simple soft drink" in 1970s. "You have been a beautiful baby" in 80s. "Missing you all the time" and "Always Vitasoy" in 1990s followed by "Stand by me" in 2015. Vitasoy has unveiled a new ad campaign to show that by simply gifting a pack of its soybean milk, you can show your loved ones that you care and that you are "standing by them".





Their management understands the needs and development of the market. It is necessary to enhance product quality, development of new products and packaging innovation through strong marketing campaign in order to make their brand more deeply rooted in the heart of consumers. They have launched five series of in-depth TV advertisement and a print advertising campaign for main products. The overall brand image of Vitasoy continuously improves and strengthens their leadership position in the market. TV commercial, social media, magazine/newspapers, billboards & event sponsorships) and conducted many consumer communication campaigns. Noteworthy is their in-store execution particularly in chain supermarket which dominates majority of the shelf-space with prominent product displays and conducted tactical bundle sales regularly.

➤ Repackaged

Vitasoy knows that traditional thinking or marketing methods cannot being unchanged, otherwise companies will be eliminated soon or later. Therefore, in order to attract more young customers, Vitasoy launched a 70th anniversary packaging design competition few years ago to commemorate its 70th anniversary in order to attracts primary and secondary school students and young people to participate.



The winning design will be printed on the carton pack of Vitasoy products. It's work! It's greatly praised. Young people scramble to put their design work online for discussion and hope to get recognition and affirmation. With online promotion and comments on the design works, let netizens participate and feel the culture of the Vitasoy. This creative branding promotion event has made the name of Vitasoy again widely passed through the circle of young people, let them re-understand and deepen their understanding of Vitasoy. Their brand image and reputation has been well-established, again!

➤ Time To Open New Market

● *First Attempt On International Market*

Apart from product and package innovation, their management also understands expansion of business is a must for sustainable business growth. With the foundation of Hong Kong market has stabilized, they start to look into international market. However, Internationalization is not an easy task for Vitasoy. An unseen challenge in taste request in different region will be faced. Vitasoy had an



international attempt before but it has only expanded to Philippines, Australia, New Zealand and Singapore. In 2016, the company sold certain assets in the North American business.



- *Frist Step Into Success - China Market*

In 1994, the factory in Shenzhen China was officially put into operation. In 1998, the Shanghai plant started to operate followed by 2011 in Foshan then 2016 in Wuhan. Unlike other companies, when Vitasoy enters a market, they often transfer goods from other regions first before ensuring the sales is stable and build factory there. This makes its expansion much slower than other competitors. This is related to their management style: stable expansion, no rush, good cash flow, high ratio of dividend. By the end of fiscal 2006, Vitasoy's revenue in China was only 171 million, accounting for less than 7% of revenue. Although the company's performance growth was mainly in China market, but the revenue in China have not exceeded Hong Kong and Macau until 2016. So it can tell the company still has a large market opportunity in China. In Guangdong, Vitasoy products can be seen in almost every channel. Consumers can buy Vitasoy products everywhere. This is a manifestation of the



company to prove it's steady and pragmatic. If copying the same method to other regions, a huge success can be expected for the future of Vitasoy in China.

Apparently Vitasoy picked the right way and on the right track. They foresee China is a huge market with huge opportunities since ten years ago, as long as with good management and operational skill. In overall, the reason for out of expected results for Vitasoy was mainly due to the increased income in all regional markets, which contributed the most in the rapid growth of the China market. Its China's regional income surged by 1 billion RMB in just one year, which further reduced the market share of Kangshibo (Vitasoy's biggest competitor in China). The most worthy of attention is that the share price of Vitasoy has risen by more than 50% in the past year and the price-earnings ratio has reached 47 times. From April 2016 to March 2017, China's revenue increased by 11% to 2.67 billion RMB. By the end of March 2018, the income of Vitasoy in China surged 39% year-on-year to 3.7 billion RMB. A sharp increase of 1.03 billion RMB in a year and operating profit increased by 71% year-on-year to 542 million RMB.





In China, company used to spend lot of money on advertisement and promotion. Vitasoy did not do promotion in that way but consumer can find their products everywhere no matter in big supermarket or grocery. They also understand the packaging is important to attract consumer's eyes. The taste of products under Vitasoy is detailed and clear. Whether it is soy milk, milk tea or lemon tea, special attention is paid to individual needs. It is divided into low sugar, sugar-free, normal sugar and so on. Even milk tea products have normal taste and tea concentration, the company's intentions on the end user can be seen.

Since 2017, Vitasoy invested about RMB 1 billion in phases to build a new production plant in Changping. The relevant investment amount includes the price of land use and the estimated construction and operating costs of the production base. It is expected that the plant will start production in 2021. To ensure that there is sufficient capacity for future expansion. Vitasoy's existing Shenzhen production plant has reached its maximum capacity, and the land in Changping is just right for building a larger production plant.

➤ **Stable Growth with Satisfactory Financial Figures**

With no doubt, the stable financial data is a key success factor for Vitasoy over the years. There is unnecessary to talk about the stability of performance but all we can find from their cash flow. In the past 10 years, net profit has continued to grow, and it is real profit. It can be seen that the net operating cash flow is much higher than the net profit all the years. The asset-liability ratio in the past 10 years is between 40% and 50%, and interest-bearing liabilities are very small but mainly operating liabilities.



According to the company announcement in Nov 2018, in the 1H of the fiscal year 2018-2019, Vitasoy achieved a more-than-expected growth: the company maintained a considerable growth rate in terms of revenue, gross profit margin and net profit, and as always, achieved a stable dividend.

綜合損益表			
	附註	截至九月三十日止六個月 二零一八年 港幣千元 (未經審核)	二零一七年 港幣千元 (未經審核)
收入	4、5	4,447,550	3,646,166
銷售成本		(2,039,796)	(1,724,472)
毛利		2,407,754	1,921,694
其他收入		17,537	9,999
推廣、銷售及分銷費用		(1,215,473)	(919,930)
行政費用		(308,669)	(255,078)
其他經營費用		(187,505)	(188,369)
經營溢利		713,644	568,316
融資成本	6(a)	(906)	(918)
所佔合營公司虧損		(9,490)	(10,071)
除稅前溢利	6	703,248	557,327
所得稅	7	(153,498)	(129,968)
本期溢利		549,750	427,359
下列人士應佔：			
本公司股權持有人		517,727	396,880
非控股權益		32,023	30,479
本期溢利		549,750	427,359

As shown in the above chart, the income of Vitasoy increased by 22% year-on-year to 4.45 billion HKD; gross profit increased by 25% to 2.408 billion HKD, and gross profit margin increased by 1.4% from 52.7% in the same period of last year. Up to 54.1%; on the basis of the increase in revenue and gross profit margin, Vitasoy's net profit for the first half of the fiscal year recorded 518 million HKD, a substantial increase of 30.4% over the same period of last year, strong performance exceeded its own internal growth expectations.



➤ Constantly Innovating With New Idea

In fact, the success of Vitasoy is not only the production technology, product positioning and unique publicity. What's more, the company can always create new products that are popular with consumers, for example, the juice series launched by Vitasoy in 1976. The lemon tea and chrysanthemum tea introduced in 1979 are still popular after 40 years.

Lemon tea became a popular product in mainland China in 2016, capturing the hearts of many young people and sales have gradually increased. Driven by the sales of lemon tea, Vitasoy's sales in the first half of 2017/2018 in the China reached 2.252 billion Hong Kong dollars, a year-on-year increase of 39%, and revenue growth of 53% from the same period last year.



Following the launch of the Vita Sugar Free Tea Series in Hong Kong in September 2016 (including four products of green tea, black rice tea, fragrant tablets and chrysanthemums), Vitasoy's two products of green tea and black rice tea that will be introduced in sugar-free tea products in the near future and invested in China market. These products have already taken the lead in Shanghai and Guangzhou convenience stores, and will continue to land in other regional markets in the future.

It is understood that Vitasoy is very optimistic about the development of sugar-free tea in the mainland market. The company said that in Guangzhou, Shanghai, Beijing and other cities, the number and sales of sugar-free tea brands have shown an upward trend. In Shanghai, for example, sugar-free tea has accounted for more than one-fifth of the convenience store sales, and continues to lead other categories with a double-digit growth. From the perspective of industry development, the average annual compound growth rate of tea beverages from 2007 to 2016 reached nearly 20%. It can be seen that the potential of tea beverages in China is very positive.

➤ **Assure High Quality of Products Because...We understand What you Need**

Vitasoy truly understand the needs of consumers as well as the market trend. Unlike other investors, Vitasoy is not numbly pursuit of profit but really try to understand what people desire for, such as health and quality assurance. There are



so many fake products in China. For China people, Vitasoy from Hong Kong with good reputation has guarantee of quality assurance. Vitasoy has always insisted to use certified organic or selected non-genetically modified soybeans. Their quality has been awarded by different authorizations in the past till now. Food safety incidents in recent years have made the public pay more attention to food safety and traceability systems. Vitasoy was being awarded for the highest honor of “Diamond Enterprise” in 2017 by GS1 HK.



In addition to control the quality, the company inspects both semi-finished and finished products, and can also trace different food sources, not only to improve food transparency, but also to enhance consumer confidence in product. After the raw materials came to the company, it will not be put into production immediately. Instead, they will first check the quality, screen out the bad quality, and put them into the production line. After the semi-finished products are finished, they will also check if the taste or ingredients are not up to standard. In the meantime, adjustments will be made such as adding soy beans, etc., and the finished products will also be inspected in the same way to ensure food safety.



➤ **1995 Incident - The Biggest Challenge Ever Happened**

Vitasoy keep adhering to its belief in providing nutritious and plant-based products to the public. Developing new technology to continuously improve its quality of products. Utilization of resources to ameliorate people's life is an important Confucian concept. It means making the best use of resources for the enrichment of life.

In 1995, Vitasoy received complaints from customers saying that its product tasted sour. Vitasoy immediately recalled 1,200,000 boxes of products then hired a Sweden expert to investigate the problem. Meanwhile, posted a printed advertisement on newspaper to explain the situation. Such incident caused more than \$80M HKD loss. Although some experts doubt whether it is necessary to recall all of the products but this behavior shown that Vitasoy is willing to take responsibility for customers by bearing the huge loss. Vitasoy repackaged its products and launched in February of the following year, their sales were very good! Even better than before!

➤ **Expansion of Business Sector**



Vitaland, another subsidiary was founded in 1991, is a wholly owned subsidiary of Vitasoy International Holdings Limited specialize in the operation and



management of the tuck shops in Hong Kong primary and secondary school and canteen business. Vitaland is the first local food retailer to be awarded with Hazard Analysis and Critical Control Point (HACCP) accreditation in Hong Kong. From preparation, production, distribution and customer service, they are all subject to stringent quality control and analysis, so as to provide quality food products every day. The net sales of the school snacks and catering business operated by the Vitaland increased stably and bring stable profit contribution to the Group.

➤ **The Key Successful Factors of Vitasoy**

A. Business Expansion

To set up a manufacturing plant in China let Vitasoy have a better control of resources. This is one of the reasons that made Vitasoy a successful and profitable company and then became the market leader.

.B. Current Products

Since the decrease of its sales of the existing products is related to the economic downturn in 2009 as well as the change of consumers' taste, it pointed out that the existing market segment is quite sensitive to price. So therefore, Vitasoy need to find ways to protect and increase its brand equity. But, Vitasoy's image of brand name and reputation which gives Vitasoy a sustainable competitive advantage to maintain its existing customers. Thus, Vitasoy plans to maintain the existing products production but at the same time developing new products in order to fulfill the needs of customers.



C. To Develop New Product

Vitasoy intends to develop new products which have unique features and competitive advantages. Even though there are so many different kinds of drink products in the market and many parents thought that some of the beverages are not so healthy. Hence, Vitasoy has to develop new products that are both thirsty-quenching and healthy. The target of the new product can be as below:

- Non-alcoholic and energetic drinks
- Use carbonated mineral water with aloe as base materials for healthy product
- Using different flavors of fruit juice such as orange, lemonade and grapefruit to produce new products
- Add vitamin C and electrolytes as good-to-health ingredients
- Using recyclable or biodegradable materials for new packaging for environmental-friendly image and impression

4. Stable profitability

Although the sales performance is not good enough in the past few years, Vitasoy still having a satisfactory profit because of the large market share and also the setup of manufacturing plants in Hong Kong and China. It reduced the operation costs such as distribution, inventory, warehousing and transportation. Since the company has good financial position, Vitasoy can afford the huge costs arise from marketing research, development of new products, associated advertising and promotion campaigns.



➤ **Conclusion**

Vitasoy has the above four key success factors identified after self-analysis. It provided core competences in competing with competitors in order to maintain its market shares and profit in both Hong Kong and China markets. The establishment of manufacturing plants in different market country is necessary. It enables Vitasoy to have a significant cost saving on production and operations then as a result, reducing inventory, warehousing, distribution and transportation. Vitasoy can have a better control on the logistics support to the dealers, distributors and customers to make sure high quality of service can be provided.

The good brand image giving Vitasoy its competitive advantage on sales and advertising its products because its customers will have higher brand loyalty and awareness. The good company reputation is the result base on high standard of quality of products and services that Vitasoy have been delivering to consumers in the past. And then, the consumers will have a very good perception on the company. The well-maintained profit margin and the good control on the production and operations costs also provided Vitasoy with a sound financial position.

The development of Vitasoy has given people a deliberate impression. This steady style ensures that the company's performance will not be short-lived after a short-term outbreak, which is the basis for a stable return to investors over the past 10 years. At present, no matter the growth rate of revenue, product competitiveness or market saturation, the growth prospects of Vitasoy is still optimistic.



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University of Wales
Trinity Saint David

CONSULTANCY MANAGEMENT

PROJECT INITIATION DOCUMENT (PID)

2018

Students Name: Winnie SIN Yik Ngan

Masters: Consultancy Management

Project Initiation Document (PID)

INSTRUCTIONS:

- Give as much justification as possible for every question asked. This means, you must not limit yourself to just stating WHAT you believe is an appropriate response, but WHY.
- ALWAYS provide an outline of the financial and cost imperatives associated with your project aim and objectives. Remember, you must be able to SELL your project idea.
- Put effort into your PID and you will benefit when it comes to undertaking your project and writing your final report.

PID submission date detailed on module schedule



Your name:	Winnie Sin
Organisation name:	Ideal Consultancy Company Limited
Your job title/role:	Consultant
How long have you been in this job/role?	ears
Outline main purpose of your job/role:	To provide professional consultancy service to client
List the main responsibilities within your job/role:	Offer advice and expertise to organisations to help them improve their business performance in terms of operations, profitability, management, structure and strategy
Client organisation:	Vitasoy International Holdings Limited
Type of business:	Foods and Drinks
No of employees in client organisation:	7,000 in all regions
Who is the person mainly supporting your project (Sponsor)? State their job title and their relationship to you:	Name: Mr. Shwu Pyng Tzeng Chen Job title: Group Senior Director-Research & Development Relationship to you: Appointer
11. Aim of project: To study and investigate the successful factors of organisation.	
12. Objectives of project: 1. To analyze those key factors behind organisation's success 2. To understand the growth of sales in different countries 3. To analyze the possibility of sustainable development and direction 4. To foresee the future development according to this study	

13. What is the business case for considering undertaking the project? To assess the Group's past performance based on detailed data and analysis. To have a better understanding about what strategies should be implemented in business expansion, product innovation and social media promotion in order to maintain company's profit and sales and make it sustainable.
14. Identify the risks associated with the project and how these could be overcome. It will take time and cost to plan further for company business strategies. Such plan(s) need to cooperate with different people and departments with same goal. Cost will be occurred when new plan/ strategy is needed to implement and have to be managed/ supervised by a good leader with good time management.
15. List the information and resources you will need to make your project a success. State why such are needed. These may include, people, time, cash, technology, data. Identify any constraints that you may encounter and explain how you would overcome these. 1. Annual reports in the past 5 years 2. Access right to review internal figures from Finance, Marketing and Production department 3. Contact person information of each department 4. Need cooperation and support from various departments 5. Arrange a workstation with laptop 6. Secondary data sourced from internet and public sources
16. State from where you plan to collect secondary data. This means providing an early list of alphabetized websites and a bibliography that details (using Harvard method) the journals, magazines, textbooks and websites you intend to use. 1. Vitasoy International Holdings Limited (2018/19) Annual report 2018/19 available at: https://www.vitasoy.com/wp-content/uploads/2015/01/C00345_20181207.pdf (accessed: 3rd January 2019) 2. Vitasoy International Holdings Limited (2017/18) Annual report 2017/18 available at: http://www3.hkexnews.hk/listedco/listconews/sehk/2018/0713/ltn20180713263.pdf (accessed: 3rd January 2019) 3. Vitasoy International Holdings Limited (2016/17) Annual report 2016/17 available at: https://www.vitasoy.com/wp-content/uploads/2015/01/C00345-Annual-Report-Chi.pdf (accessed: 3rd January 2019) 4. Vitasoy International Holdings Limited (2015/16) Annual report 2015/16 available at: https://www.vitasoy.com/wp-content/uploads/2015/01/cw_00345-Annual-Report-Chi_20160715.pdf (accessed: 3rd January 2019) 5. Vitasoy International Holdings Limited (2014/15) Annual report 2014/15 available at: https://www.vitasoy.com/wp-content/uploads/2015/01/cw_00345-Annual-Report-Chi_20150717.pdf (accessed: 3rd January 2019) 6. Vitaland Services Limited company background. Available at: http://www.vitaland.com.hk/tc/introduction.php (accessed: 2nd January 2019)

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- Design a time plan for the lifetime of the project. Begin by breaking down all tasks that need to be undertaken and assess the duration of time you need to devote to each task. Be sure to show tasks in a logical sequence. Be further sure that you plan well enough to enable you submit your project report on the deadline date. Include any meetings that are planned with your project lecturer at UWTSD. Be realistic and make your project manageable, account for holidays and other "off-days".

Task	Date to be completed
1. Gather information from different parties/ departments/ sources	20 th December 2018
2. Submit a preliminary analysis and discuss with management	5 th January 2019
3. To complete a formal proposal and discuss with management	18 th January 2019
4. Meeting with departments	23 rd January 2019
5. Implementation	1st February 2019
6. Follow-up with departments	1 st March 2019
7. Report results to management and follow up	1 st May 2019



LEVEL 7 ASSESSMENT SPECIFICATION

Student name:	SIN Yik Ngan	Student ID number:	1812212
Programme:	MBA		
Module:	Consultancy Management		
Module code:	SBMA7136	Contribution to Overall Module Assessment (%):	100%
Lecturer:	Dr Joe Leung	Internal Verifier:	Dr Poon Che Cheong
Assignment Title:	Assignment 1	Word count (or equivalent):	4,000 words
Submission deadline:	7 January 2019	Return date of provisional marks & written feedback:	28 January 2019
Submission method:	All written assessments, where practical and possible, must be submitted via Turnitin unless otherwise instructed by the Lecturer. (Please DO NOT put this assessment specification into Turnitin or it will match many similarities with other students' submissions.) Alternative submission method (if applicable): Late submission of the assessment will result in a late penalty mark. Penalties for late submission: Up to one week late, maximum mark of 50%. Over one week late, 0%. Only the Extenuating Circumstances Panel may approve a change to submission dates.		
Academic honesty / referencing:	Academic honesty is required. In the main body of your submission you must give credit to authors on whose research and ideas your work is based. Append to your submission a reference list that indicates the books, articles, etc. that you have used, cited or quoted in order to complete this assessment.		

Module Learning Outcomes
(from module syllabus)

- Have an in-depth understanding of consultancy as a specialism and the potentially positive contribution that such intervention can make to aid an organisation's ability to achieve and sustain competitive advantage through effectively managing change and embracing innovation.
- Critically evaluate external and/or internal influences that impact upon an organisation's ability to serve and bring about outstanding customer service, product and service innovation.
- Timely progress of consultancy projects from initial idea to the presentation of persuasive, pertinent and actionable reports.
- Conduct critical and relevant literature and research reviews through the study of a wide range of resources, including wherever possible, in-company information that serves to increase the credibility of projects.
- Understand research methods and their relevance to different projects; data collection and handling, evaluation of the strengths and weaknesses of each and identification of the circumstances in which they might be used. Ethical considerations.

TASK DESCRIPTION

Assignment 100%

A Project Initiation Document (PID) and a Research Ethics Form need to be fully completed. These two documents will provide the basis for your consultancy project and are largely formative in nature. In the PID, project ideas are formulated and finalised, and then presented to peers for critical review. The PID carries a nominal mark of 10% and must not be longer than 1,000 words. This is followed by a 4,000 words consultant's report that addresses the specifics of the project aim and objectives as set out in the PID. Finally, the Student Self-Evaluation Form needs to be completed.

Tasks

- Select an organization as the assignment background (either the student's preferred company or a chosen public-list company)
- Identify a management problem and issue (e.g. customer service, product and service innovation, change management or process improvement) in the business environment.
- Conduct a timely and professional consultancy service for the chosen organization and prepare a consultancy report. The report needs to reflect a critical understanding of consultancy management tools and business research methods.

Project Length Required

4,000 words +/- 10%. Any deviation from this will be penalised.

Formatting and Layout

Please note the following when completing your written assignment:

1. **Writing:** Written in English in an appropriate business/academic style
2. **Focus:** Focus only on the tasks set in the assignment.
3. **Length:** **4,000 words**
4. **Formatting:** Typed on A4 paper in Times New Roman or Arial font 12 with at least 2.5 centimetre space at each edge, double spaced and pages numbered.
5. **Document format:** Ensure a clear title, course, and name or ID number is on a cover sheet and a bibliography using Harvard referencing throughout is also provided.
6. **Research:** Research should use reliable and relevant sources of information e.g. academic books and journals that have been peer reviewed. The research should be extensive.

The use of a range of information sources is expected – academic books, peer reviewed journal articles, professional articles, press releases and newspaper articles, reliable statistics, company annual reports and other company information. Ensure that you reference correctly, using University's referencing guide at <https://www.uwtsd.ac.uk/library/infoskills/referencing-handbooks/>

GUIDANCE FOR STUDENTS IN THE COMPLETION OF TASKS

NOTE: The guidance offered below is linked to the five generic assessment criteria overleaf.

1. Engagement with Literature Skills

Your work must be informed and supported by scholarly material that is *relevant* to and *focused* on the task(s) set; you should make use of scholarly reviews and primary sources, as appropriate (for example, refereed research articles and/or original materials appropriate to the discipline). You should provide evidence that you have accessed a wide *range* of sources, which may be academic, governmental and industrial; these sources may include academic journal articles, textbooks, current news articles, organisational documents, and websites. You should consider the *credibility* of your sources; academic journals are normally highly credible sources while websites require careful consideration/selection and should be used sparingly. Any sources you use should be current and up-to-date, mostly published within the last five years or so, though seminal/important works in the field may be older. You must provide *evidence* of your research/own reading throughout your work, using correctly a suitable referencing system, including in-text citations in the main body of your work and a reference list at the end of your work.

Guidance specific to this assessment: *It is important that these reports are not overloaded with theory. You need to include and refer to academic theory, but only as a basis – consultancy reports are not dissertations where academic theory need to be discussed in detail.*

2. Knowledge and Understanding Skills

At level 7, you should be able to demonstrate a systematic understanding of knowledge, and a critical awareness of current problems and/or new insights, much of which is at, or informed by, the forefront of your academic discipline, field of study or area of professional practice, with a comprehensive understanding of techniques applicable to your own research or advanced scholarship. Your work must demonstrate your growing mastery of these concepts, principles, current challenges, innovation and insights associated with the subject area. *Knowledge* relates to the facts, information and skills you have acquired through your learning. You demonstrate your *understanding* by interpreting the meaning of the facts and information (knowledge). This means that you need to select and include in your work the contemporary concepts, techniques, models, theories, etc. appropriate to the task(s) set. You should be able to explain the theories, concepts, etc. meaningfully to show your understanding. Your mark/grade will also depend upon the *extent* to which you demonstrate your knowledge and understanding; ideally each should be complete and detailed, with comprehensive coverage.

Guidance specific to this assessment: *You need to demonstrate a genuine understanding of the management issue chosen and of the environment in which your chosen organisation is operating. Use research based (academic and applied) academic references to underpin your knowledge.*

3. Cognitive and Intellectual Skills

You should be able to: evaluate critically current research and advanced scholarship in the discipline; evaluate methodologies and develop critiques of them and, where appropriate, to propose new hypotheses; deal with complex issues both systematically and creatively to make sound judgements in the absence of complete data. Your work must contain evidence of logical, analytical thinking, evaluation and synthesis. For example, to examine and break information down into parts, make inferences, compile, compare and contrast information. This means not just describing what! But also justifying: Why? How? When? Who? Where? At what cost? At all times, you must provide justification for your arguments and judgements. Evidence that you have reflected upon the ideas of experts within the subject area is crucial to you providing a reasoned and informed debate within your work. Your choice of methodologies to gather data and information must be rigorously defended. Furthermore, you should provide evidence that you are able to make sound judgements and convincing arguments using data and concepts. Sound, valid, persuasive

conclusions are necessary and must be derived from the content of your work. Where relevant, alternative solutions and recommendations may be proposed.

Guidance specific to this assessment:

4. Practical Skills

At level 7, you should be able to demonstrate originality in the application of knowledge, together with a practical understanding of how established techniques of research and enquiry are used to create and interpret knowledge in the discipline. This includes acting autonomously in planning and implementing tasks at a professional or equivalent level, originality in tackling and solving problems, and decision-making in complex and unpredictable contexts or situations.

You should be able to demonstrate mastery of the leading edge subject-related concepts and ideas as they relate to real world situations and/or particular contexts. How do they work in practice? You will deploy models, methods, techniques, and/or theories, in those contexts or circumstances, to assess current situations, perhaps to formulate plans or plausible, justifiable recommendations to solve problems, or to propose new models, or to create artefacts, which may be innovative and creative, thereby demonstrating your understanding of how the boundaries of knowledge are advanced through research and/or application. This is likely to involve, for instance, the use of real world artefacts, examples and cases, the application of a model within an organisation and/or benchmarking one theory or organisation against others.

Guidance specific to this assessment: *You need to demonstrate the use of a range of consultancy and project management tools, and if required, be able to select and evaluate appropriate business research methods.*

5. Transferable Skills for Life and Professional Practice

Your work must provide evidence of the qualities and transferable skills necessary for postgraduate-level employment in circumstances requiring sound judgement, personal responsibility and initiative in complex and unpredictable professional environments. This includes demonstrating: the independent learning ability for continuing professional development to advance existing skills and acquire new competences of a professional nature that will enable you to assume significant responsibility within organisations; that you can initiate and complete tasks, projects and procedures, whether individually and/or collaboratively, to a professional level; that you can use appropriate media to effectively communicate information, arguments and analysis in a variety of forms for a variety of audiences; fluency of expression; clarity and effectiveness in presentation and organisation. Work should be coherent and well-structured in presentation and organisation.

Guidance specific to this assessment: *This is an important area – time management, research skills and the presentation of your report will all show your professionalism.*

STUDENT FEEDBACK FORM

This section details the *extent* to which the assessment criteria are demonstrated by you, which in turn determines your mark. The marks available for each category of skill are shown. Lecturers will use the space provided to comment on the achievement of the task(s), including those areas in which you have performed well and areas that would benefit from development/improvement.

Generic Assessment Criteria	Marks available	Marks awarded
1. Engagement with Literature Skills		
- Conduct relevant literature and research review of the research focus areas. - Discuss the recent/relevant models, framework or concepts of scholars. - Refer to text books, current news items and benchmark your chosen organisation. - Demonstrate the high-level referencing skills (Harvard Method System).	20	
2. Knowledge and Understanding Skills		
Project Initiation Document Planning (less than 1,000 words): - Describe project initial idea and the background of the chosen organisation. - Define your role and responsibilities - Explain aims and objectives, risk, information sources, research method and time plan. Consultancy Project Report - Consultancy and Content (4,000 words): - Understanding of consultancy and the potentially positive contribution to aid an organisation's ability to achieve and sustain competitive advantage through effectively managing change and embracing innovation. - Critically evaluate external and/or internal influences and impact upon the organization's ability to serve and bring about outstanding customer service, product and service innovation, change management and process improvement. Highlight the management problem/issue, relevant solutions and discuss what measures should be taken to improve the performance.	10 20	
3. Cognitive and Intellectual Skills		
- Appropriate research design for the research problem(s) and objective(s). - Describe the sources, contents and collection methods of primary and secondary data. - Describe the samples, sampling techniques and data gathering. - Analytical skill of the data presentation. - Discussion of the findings	20	
4. Practical Application Skills		
Conclusion and recommendation are relevance to the project objectives.	20	

• Conclusion is justifiable and relating to the research findings. • Recommendation is practical to solve the problem/issue. • Project results are applicable to business organization.		
5. Transferable Skills for Life and Professional Practice		
Writing style, logical flow, structure, presentation style, appendix and referencing (Harvard Referencing System).	10	

Assessment Mark (Assessment marks are subject to ratification at the Exam Board. These comments and marks are to give feedback on module work and are for guidance only until they are confirmed.)	Late Submission Penalties (tick if appropriate)		%
	Up to 1 week late (40% Max)		
	Over 1 week late (0%)		

GENERIC ASSESSMENT CRITERIA

Level 7

In accordance with the Framework for Higher Education Qualifications, at the end of Level 7 students should be able to demonstrate: a systematic understanding of knowledge, and a critical awareness of current problems and/or new insights, much of which is at, or informed by, the forefront of their academic discipline or area of professional practice; a comprehensive understanding of techniques applicable to their own research or advanced scholarship; originality in the application of knowledge, together with a practical understanding of how established techniques of research and enquiry are used to create and interpret knowledge in the discipline; conceptual understanding that enables the student to evaluate critically current research and advanced scholarship in the discipline to evaluate methodologies and develop critiques of them and, where appropriate, to propose new hypotheses. They will be able to deal with complex issues both systematically and creatively, make sound judgements in the absence of complete data, and communicate their conclusions clearly to specialist and non-specialist audiences. They will demonstrate self-direction and originality in tackling and solving problems, and act autonomously in planning and implementing tasks at a professional or equivalent level to continue to advance their knowledge and understanding, and to develop new skills to a high level. They the qualities and transferable skills necessary for employment requiring the exercise of initiative and personal responsibility; decision-making in complex and unpredictable situations/professional environments; and the independent learning ability required for continuing professional development.

Level 7	FAIL	FAIL	MARGINAL FAIL	SATISFACTORY (Pass)	GOOD to VERY GOOD (Merit)	EXCELLENT (Distinction)	EXCEPTIONAL (Distinction)
Category	0-29%	30-44%	45-49%	50-59%	60-69%	70-84%	85-100%
Engagement with literature (including current research, referencing, academic conventions and academic honesty)	Little or no evidence of reading and/or reliance on inappropriate sources. Views and findings mostly unsupported and non-authoritative. Referencing conventions used incoherently or largely absent.	Poor engagement with essential reading. No evidence of wider reading. Reliance on inappropriate sources, and/or indiscriminate use of sources. Heavily reliant on information gained through class contact. Inconsistent and weak use of referencing.	Engagement with a very limited range of relevant and credible sources. Some omissions and minor errors. Referencing conventions evident though not always applied accurately or consistently.	Engagement with an appropriate range of research-informed literature, including sources retrieved independently. Some over-reliance on texts. Referencing may show minor inaccuracies or inconsistencies.	Engagement with a wide range of research-informed literature, including sources retrieved independently. Selection of relevant and credible sources. Very good use of referencing, with no/very few inaccuracies or inconsistencies.	Engagement with an extensive range of relevant and credible literature, informed by the latest research. Consistently accurate application of referencing.	Exceptional engagement with an extensive range of relevant and credible literature, informed by the latest research. High-level referencing skills consistently and professionally applied.
Knowledge and	Major gaps in knowledge and	Gaps in knowledge, with	Limited knowledge and	Knowledge is accurate and	Knowledge has a well-defined	Excellent mastery of a	Exceptional mastery of a

Level 7	FAIL	FAIL	MARGINAL FAIL	SATISFACTORY (Pass)	GOOD to VERY GOOD (Merit)	EXCELLENT (Distinction)	EXCEPTIONAL (Distinction)
Category	0-29%	30-44%	45-49%	50-59%	60-69%	70-84%	85-100%
understanding (A systematic, conceptual understanding of knowledge, and a critical awareness of current problems and/or new insights, much of which is at, or informed by, the forefront of the discipline; a comprehensive understanding of techniques applicable to their own research)	understanding of the subject matter is not systematic. Substantial inaccuracies. No awareness of current problems, insights or the latest research and/or advanced scholarship within the discipline.	only superficial systematic understanding. Some significant inaccuracies and/or irrelevant material. No critical awareness of current problems, insights, or latest research within the discipline.	systematic understanding of the concepts and principles within the subject area, which to some marginal extent, is informed by current research and scholarship. Some critical awareness of current problems and/or new insights, but often under-developed.	reasonably detailed. A systematic understanding of the field of study informed by, to some extent, current research and scholarship. A critical awareness of current problems and/or new insights though this may be under-developed occasionally.	focus, which is reasonably extensive, coherent and detailed, with a critical awareness of current problems and/or new insights. Exhibits good understanding of the breadth and depth of contemporary and established views, and the work is, at least in part, well-informed by current research and scholarship.	complex and specialised area of knowledge. A systematic, excellent understanding of the concepts of the subject informed by current research and scholarship. Highly critical awareness of current problems and/or new insights. A critical, awareness of how the boundaries of knowledge are advanced through research.	complex and specialised area of knowledge. An exceptionally critical awareness of current problems and/or new insights. An outstanding understanding of the concepts of the subject, well-informed by current research and scholarship. A critical, sophisticated and nuanced awareness of how the boundaries of knowledge are advanced through research.
Cognitive and intellectual skills (Critical evaluation of current research and methodologies and develop critiques of them and, where appropriate, to propose new hypotheses; make sound	Wholly or almost wholly descriptive work. Little or no evaluation or critique or attempt at a systematic approach. Failure to develop arguments, leading to illogical or invalid	Largely descriptive work, with superficial use of critical evaluation of research and methodologies. Absent or weak development of hypotheses and judgements. Information accepted uncritically, uses	Limited attempt at critical evaluation/ critique of current research and methodologies, tending towards description. Limited attempt to propose new hypotheses. Can deal with complex issues	Some critical evaluation/ critique of current research and methodologies, though slightly underdeveloped in places, Proposes adequate but limited new hypotheses, where relevant.	Sound critical evaluation/ critique of current research and methodologies, Proposes new hypotheses, where appropriate. Can deal with complex issues systematically and with some	Excellent critical evaluation/ critique of current research and methodologies, Proposes innovative hypotheses, where appropriate. Can synthesise complex issues systematically	Exceptional critical evaluation/ critique of current research and methodologies, Proposes innovative hypotheses, where appropriate. Exemplary systematic and

Level 7	FAIL	FAIL	MARGINAL FAIL	SATISFACTORY (Pass)	GOOD to VERY GOOD (Merit)	EXCELLENT (Distinction)	EXCEPTIONAL (Distinction)
Category	0-29%	30-44%	45-49%	50-59%	60-69%	70-84%	85-100%
judgements in the absence of complete data.)	judgements. Unsubstantiated generalisations, made without use of credible evidence.	generalised statements made with scant evidence and unsubstantiated opinions. Ideas sometimes illogical and contradictory.	but not systematically or creatively. Some evidence to support emerging judgements but these may be underdeveloped or with a little inconsistency / mis-interpretation. May assert rather than argue a case.	Can deal with complex issues but not fully systematically or creatively. Ability to make judgements based on data (that may be incomplete) but with some tendency to assert/state opinion rather than argue on the basis of reason and evidence.	creativity. Ability to make sound judgements based on data (that may be incomplete)	and creatively. Ability to investigate contradictory or incomplete information and make strong, persuasive, arguments and sophisticated judgements.	creative synthesis of complex issues. Ability to investigate contradictory or incomplete information and make strong, persuasive, arguments and sophisticated, nuanced, judgements. Potential for journal publication or doctoral research.
Practical skills (Originality / creativity in the application of knowledge, tools and techniques and in tackling and solving problems in complex and unpredictable professional situations; practical use of established techniques of research and enquiry to create and interpret knowledge in the discipline.)	Limited or no use of methods, materials, tools and/or techniques. Little or no appreciation of the context of the application. Limited understanding of the application of theory to practice or making appropriate links between the two. Very weak problem-solving skills in complex and	Rudimentary application of methods, materials, tools and/or techniques but without consideration and competence. Flawed appreciation of the context of the application. Weak understanding of the application of theory to practice, with only occasional evidence of	An awareness and mostly appropriate application of well-established methods, materials, tools and/or techniques, with occasional errors. Basic appreciation of the context of the application. Theoretical knowledge and understanding applied in practice, but not always making	An appropriate application of standard methods, materials, tools and/or techniques. Clear appreciation of the context of the application. Mainly consistent, accurate and logical application of theory to practice, making appropriate links between the two. Can identify	A very good application of a range of methods, materials, tools and/or techniques. Very good consideration of the context of the application, with perceptive insights. Can identify problems and propose appropriate solutions in complex and unpredictable contexts. Evidence of	An advanced application of knowledge, methods, materials, tools and/or techniques. The context of the application is well considered, and insightful. Can identify complex problems and propose excellent solutions. An excellent grasp of techniques applicable to own research or	Exceptional application skills in complex, unpredictable, contexts, drawing skilfully on the latest research within the discipline. Can identify complex problems and propose sophisticated, original solutions. An outstanding application of techniques applicable to own research or

Level 7	FAIL	FAIL	MARGINAL FAIL	SATISFACTORY (Pass)	GOOD to VERY GOOD (Merit)	EXCELLENT (Distinction)	EXCEPTIONAL (Distinction)
Category	0-29%	30-44%	45-49%	50-59%	60-69%	70-84%	85-100%
	unpredictable contexts.	making appropriate links between the two. Weak problem-solving skills in complex and unpredictable contexts.	logical links between the two. Can identify problems and propose basic solutions without fully appreciating the complexity of unpredictable contexts.	problems and propose mostly appropriate solutions in complex and unpredictable contexts, with elements of originality.	originality and creativity.	advanced scholarship. Shows originality in application of knowledge and techniques, and of how established techniques of enquiry create and interpret knowledge in the discipline.	advanced scholarship. Shows originality in application of knowledge and techniques, and of how established techniques of enquiry create and interpret knowledge in the discipline with assimilation and development of cutting edge processes and techniques.
Transferable skills for life and professional practice (Exercise of self-direction, autonomy and personal responsibility; plan and implement tasks at a professional level; independent learning; use appropriate media to communicate effectively and professionally to a variety of audiences; fluency of expression; systematic	Communication medium is inappropriate or misapplied. Work is poorly structured, disorganised and/or confusingly expressed. Very weak use of language and/or very inappropriate style. Little or no evidence of autonomy (or collaboration, where relevant) in the completion of tasks. Little or no evidence of	Communication medium is poorly designed and/or not suitable for the audience. Work is poorly presented in a disjointed manner. It is loosely, and at times incoherently, structured, with information and ideas often poorly expressed. Weak use of language and/or inappropriate style. Weak independent	Can communicate in a suitable medium but with some room for improvement. Mostly ordered presentation and structure in which relevant ideas / concepts are reasonably expressed. Work may lack coherence in places. Can work as part of a team, but with limited involvement in group activities. Demonstrates	Can communicate effectively in a suitable format, but may have minor errors. Mostly coherent, organised work, in a suitable structure and is for the most part clearly expressed. Can work effectively independently and/or as part of a team, with clear contribution to group activities. Demonstrates the skills	Can communicate well, confidently and consistently in a suitable format. Work is coherent, fluent, well-structured and organised. Can work very well autonomously and/or as part of a team, with a good contribution to group activities. Demonstrates comprehensive professional, postgraduate	Can communicate professionally confidently and consistently in a suitable format. Work is coherent, very fluent and is presented professionally. Can work autonomously with initiative. Where relevant can work professionally within a team, showing leadership skills as appropriate, managing	Can communicate with an exceptionally high level of professionalism. Work is remarkably coherent, very fluent and is presented professionally. Can work outstandingly well and professionally within a team, showing advanced leadership skills. Demonstrates exemplary

Level 7	FAIL	FAIL	MARGINAL FAIL	SATISFACTORY (Pass)	GOOD to VERY GOOD (Merit)	EXCELLENT (Distinction)	EXCEPTIONAL (Distinction)
Category	0-29%	30-44%	45-49%	50-59%	60-69%	70-84%	85-100%
approach; clarity and effectiveness in presentation and organisation.)	the skills required in professional, postgraduate employment.	initiative (or collaboration, if relevant). Limited evidence of the skills required in professional, postgraduate employment.	some but not all of the basic skills required in professional, postgraduate employment, with some areas of minor weakness.	required in professional, postgraduate employment, with some areas of strength and some of minor weakness.	employment skills.	conflict and meeting obligations. Demonstrates excellent professional, postgraduate employment skills and a strong appetite for further development.	professional, postgraduate employment skills and a strong appetite for further development.

Student Self Evaluation Form

Student name:	SIN Yik Ngan	Student number:	1812212
Programme:	University of Wales Trinity Saint David - Master of Business Administration	Year of programme	2018/19
Assignment Title:	<u>Consultancy Management</u>		

This section repeats in brief the common assessment criteria detailed on previous pages. The *extent* to which these are demonstrated by you determines your mark. Using these criteria, tick the box that best indicates the level of achievement you feel you have achieved with regard to each of them.

Common Assessment Criteria Applied	Level of Achievement						
	REFER			PASS		DISTINCTION	
	FAIL	FAIL	MARGINAL FAIL	SATISFACTORY	GOOD to VERY GOOD	EXCELLENT	EXCEPTIONAL
1. Engagement with literature	0-29%	30-39%	40-49%	50-59%	60-69%	70-84%	85-100%
	☐	☐	☐	☐	☐	✓	☐
2. Knowledge and Understanding	0-29%	30-39%	40-49%	50-59%	60-69%	70-84%	85-100%
	☐	☐	☐	☐	☐	✓	☐
3. Cognitive and intellectual skills	0-29%	30-39%	40-49%	50-59%	60-69%	70-84%	85-100%
	☐	☐	☐	☐	☐	✓	☐
4. Practical Skills	0-29%	30-39%	40-49%	50-59%	60-69%	70-84%	85-100%
	☐	☐	☐	☐	☐	✓	☐
5. Transferable Skills for Life and Professional Practice	0-29%	30-39%	40-49%	50-59%	60-69%	70-84%	85-100%
	☐	☐	☐	☐	☐	✓	☐

PLEASE COMMENT ON AREAS IN WHICH YOU FEEL THAT YOU HAVE PERFORMED WELL		PLEASE COMMENT ON AREAS YOU FEEL THAT YOU NEED TO DEVELOP	
Learnt how to think out of the box		Pay more attention to social affairs and world's finance	
Student's Name	SIN Yik Ngan	Date	6 th January 2019
Student's Signature			